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# The Food Marketing Industry Speaks

1989

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The Food Marketing Institute (FMI) is a nonprofit association conducting programs in research, education and public affairs on behalf of its 1,600 members—food retailers and wholesalers and their customers in the United States and overseas. FMI's domestic member companies operate approximately 17,000 retail food stores with a combined annual sales volume of $180 billion—more than half of all grocery sales in the United States. Most of FMI's retail membership is composed of large multi-store chains, small regional firms and independent supermarkets. Its international membership includes more than 200 members from over 50 nations.

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# Introduction

The food distribution industry is one of the most highly visible parts of society. To provide consumers with the best products and services and operate with the greatest efficiency, the industry must interact with the multifaceted environment, continually reacting, planning and adapting. This year's *Food Marketing Industry Speaks* provides a concise picture of the industry's response to such diverse issues as the solid waste problem, leveraged buyouts, the slowing population growth and changing employee base. Much of the the report is devoted to the labor side of the business and the role of productivity, recruitment and retention, store managers, etc. Those interested in the consumer aspects of food distribution should see FMI's *Trends—Consumer Attitudes and the Supermarket.*

Many issues require cooperation with other industries. To deal with these issues, several joint committees comprising representatives from both food manufacturers and distributors have been created to deal with issues involving both. Current projects include new product introductions, product reclaim centers, shipping container design, invoice deductions, product measurement standards, coupons, trade practice guidelines and the application of the Uniform Communication Standard to direct store delivery (UCS/DSD). Those desiring information on the activities of these committees should contact FMI's research department.

**Key Facts**

| | |
|---|---|
| Retail Sales Gain Over Previous Year | 5.5% |
| Wholesale Sales Gain Over Previous Year | [illegible] |
| Weekly Sales per Supermarket | [illegible] |
| Weekly Sales per Square Foot | [illegible] |
| Sales per Labor Hour | [illegible] |
| Average Number of Items | [illegible] |
| Average Sale per Customer Transaction | [illegible] |

# Executive Summary

In 1988, the food distribution industry continued to adapt to the changes in the business environment. These included the slow-growing population, the labor shortage, the plethora of leveraged buyouts, the solid waste crisis, and changing consumer demographics.

The U.S. population is expected to grow at a slow and steady pace about one percent per year or less, according to the U.S. Bureau of the Census. The industry has reacted to this trend by cutting back the construction of new stores, increasing the remodeling of existing ones, and the outright buying and selling of companies.

Retail sales in 1988 grew 6.9 percent in current dollars over 1987, which translates into 2.6 percent in real dollars. Sales in identical stores, those open during the entire two-year period, grew 5.5 percent in current dollars or 1.3 percent when adjusted for inflation.

Supermarkets continued the trend of greater efficiency. In real terms, key productivity figures such as weekly store sales and sales per square foot increased significantly in the past five years. Overall store size increased slightly.

Personnel issues highlight this year's report. A median of five percent of the available positions in stores are going unfilled due to the labor shortage. Recruitment and retention practices are discussed as the industry continues to deal with this new operations reality. The report also profiles store managers and presents the opinions of human resource executives on the state of store managers five years from now.

This year's Speaks contains a study of loss prevention in the supermarket. Included are data on shoplifting, employee theft, loss prevention personnel, budgets, preventive technology, etc.

The wholesale and distribution center section of this year's report presents data on labor costs, personnel policies, wholesale sales and services, and productivity.

FMI compiles the majority of the data in this report from our annual study of the industry. Survey questionnaires were mailed to FMI member companies and selected nonmember firms. FMI gratefully acknowledges all those who contributed their time and effort to complete the questionnaires.

Industry information is also drawn from other FMI research, such as the *Operations Review* and *Facts About Store Development.* The institute would like to acknowledge data gathered from the U.S. Departments of Agriculture and Commerce and from other government agencies and publications. A detailed explanation of the study's methodology appears in the appendix.

This report contains a complete analysis for 1988, but it does not include all data from which it was developed. This information is provided in the companion report *Detailed Tabulations from the Food Marketing Industry Speaks, 1989.*

# The Business Environment

Three conspicuous interrelated phenomena characterize the food distribution environment in the late 1980s: the slow population growth; the labor shortage; and leveraged buyouts. The industry is also faced with such diverse issues such as the solid-waste problem, food safety and the food production cycle. At this time, the industry is innovating new forms of competition such as price clubs, hypermarkets and category-dominant specialty stores.

**The Population**
Supermarket operators in the late 1980s have had to realign their strategic planning to deal with an overall population that is increasing at 1 percent or less per year. Food distributors have had to adapt to demographic and social changes as well. Seven in 10 women aged 25 to 54 are working outside the home, up from about three in 10 in the late 1940s, according to the labor department. Supermarket retailers have met their needs with more service departments and prepared foods. The Hispanic population is becoming a major force in certain regions resulting in marketing and recruiting efforts aimed at that group. The number of Hispanic workers rose dramatically between 1980 and 1987, accounting for almost a fifth of the nation's employment growth.

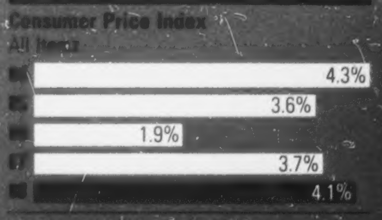
**The Economy**
The low population growth coupled with a strong economy has spawned some of the lowest unemployment rates since the mid-1970s. The civilian unemployment rate dropped to 5.5 percent for all of 1988. Retail wages and salaries increased 5.2 percent in 1988, double the 1987 increase.

Part of the reason for such high employment is the economic expansion that began in 1982. Despite the shocks of the stock-market crash in October 1987 and the devastating drought of the following summer, it continued unabated through 1988. In the third quarter the Gross National Product (GNP)—the country's total output of goods and services—surpassed the $4 trillion mark in real dollars for the first time.

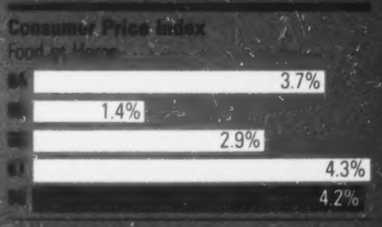
All personal consumption increased 3.5 percent from the fourth quarter of 1987 to the fourth quarter of 1988 as per capita disposable income continued to rise. Food consumption, which normally lags behind total personal consumption increases, recorded a 1.3 percent rise in the same period, in line with the overall population growth of about 1 percent. The percentage of disposable income spent on food at home declined again in 1988, according to the U.S. Department of Agriculture (USDA). The USDA changed its calculation of this figure to reflect the number of nonfood items sold in contemporary supermarkets. Thus, the 1988 figure of 7.3 percent is about two percentage points lower than it would have been under the old method. (See table on p. 8) The fact that this figure tends to drop each year reflects two things: 1) that the supermarket industry continues to provide the consumer with the the best product at the lowest possible cost and 2) that food consumption does not increase at the same pace as personal income.

The fears of steep inflation in food prices resulting from the summer's drought did not materialize in 1988. The consumer price index for food at home increased 4.2 percent, although the drought did give rise to some sharp month-to-month increases during the summer, particularly the 1.4 percent rise in July.

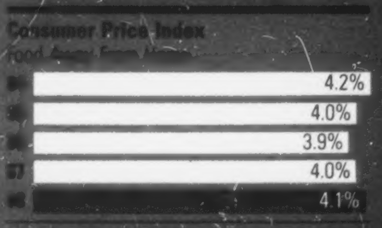
**Consumer Price Index**
All Items



**Consumer Price Index**
Food at Home



**Consumer Price Index**
Food Away From Home



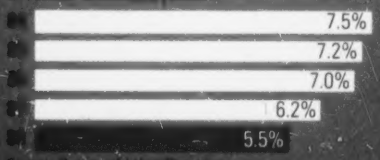
## Food Production

The U.S agricultural sector faced one of the severest droughts on record in 1988. This event was particularly hard on farmers because it began so early in the production cycle. A number of factors, including light snowcover and below normal rainfall, lowered water levels, and record high temperatures increased the plants needed for water. Fortunately, late summer rains, coupled with drought assistance and more resilient varieties of seed, helped mitigate the effects of the drought, resulting in a year far less disastrous than originally predicted.

Total red meat production in 1988 was up 3 percent over 1987, reversing the previous year's decline. The USDA reported that the concern of Americans with the consumption of fat has brought about several major changes in the beef and pork industries, influencing the amount of exterior fat trimmed off beef cuts before sale. Health concerns have not affected the overall per capita consumption because, while some people may be eating less steak, others are eating more fast-food hamburgers.

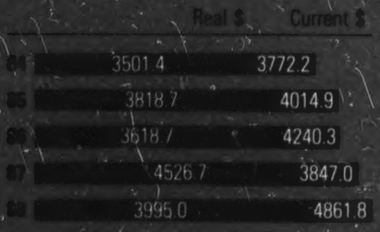
Poultry production continues to boom. Over the past three decades, American's have tripled their consumption of chicken and turkey. The total number of broilers slaughtered in 1988 increased 5 percent over 1987 to over 5.2 billion. Turkey production posted a modest gain of 1 percent in the total number of birds slaughtered, compared with a 16 percent rise in 1987 over 1986. The USDA reported that the development and introduction of many new poultry products over the past 10 years that reduce preparation time and put poultry in the public eye have enhanced poultry consumption. Another factor is the decline in poultry prices. According to a recent USDA report, the price of poultry in real dollars at the retail level actually declined 67 percent from 1955 to 1987.

**Civilian Unemployment**



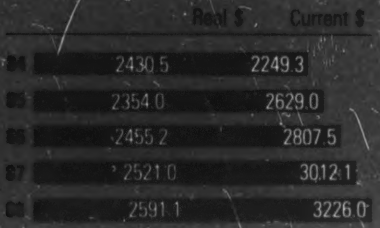
Source: Bureau of Labor Statistics

**Gross National Product**
Billions



Source: U.S. Department of Commerce, Bureau of Economic Analysis

**Total Personal Consumption**
Billions

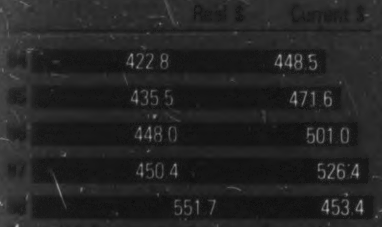


Source: U.S. Department of Commerce, Bureau of

Another interesting development is the burgeoning aquaculture industry. Catfish, salmon, striped bass, trout and crawfish are some of the leading products. The USDA believes that changing consumer preferences, particularly the trend toward eating less red meat, may be the overriding factor in this industry's growth. Also, the addition of seafood departments to the American supermarket has brought what once were regional dishes to tables nationwide. For example, catfish was once primarily Southern fare. However, in the past 20 years, production of this fish has increased phenomenally. In 1970, 5.7 million pounds of this fish were produced, rising to 46.4 million pounds in 1980, 191.6 million in 1985 and 295.1 million in 1988.

**Merger and Acquisition Activity**
The merger and acquisition fray of the past few years continued through 1988 with 42 transactions involving retail supermarket firms and 29 involving wholesalers. The industry's total debt to total equity ratio reached 70.33 percent during the 1987-88 fiscal year, according to the *FMI Annual Financial Review*—a 5.7 percent increase from that reported five years earlier. Food distributors are not alone for these developments parallel financial trends in other industries. According to the Federal Reserve, the debt to equity ratio for all U.S. nonfinancial corporations increased almost 7 percent in the same time period. The increase in leverage was also reflected in the supermarket industry's return on investment ratios, return on assets and return on equity, overall, both dropped in the 1987-88 fiscal year as the industry took on more debt and incurred higher interest expenses. Industry net profit after tax and extraordinary items was 0.77 percent of annual sales in 1987-88 compared with 1.12 percent in the previous fiscal year. Much of the decline in this figure resulted from a change in accounting procedures mandated by the Financial Accounting Standards Board. However, increased interest expenses also played a part.

**Consumption of Food**
Billions



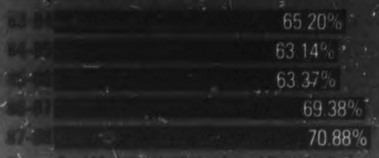
Source: U.S. Department of Commerce, Bureau of Economic Analysis

**Percentage of Disposable Income Spent on Food**

| | Old Method | | | New Method | | |
|---|---|---|---|---|---|---|
| | All Food | Food at Home | Food Away From Home | All Food | Food at Home | Food Away From Home |
| **84** | 14.8% | 10.2% | 4.6% | 12.7% | 8.3% | 4.4% |
| **85** | 14.7% | 10.15 | 4.6% | 12.5% | 8.1% | 4.4% |
| **86** | 14.5% | 9.9% | 4.6% | 12.2% | 7.8% | 4.4% |
| **87** | 14.3% | 9.6% | 4.7% | 12.1% | 7.6% | 4.5% |
| **88** | — | — | — | 11.8% | 7.3% | 4.5% |

Source: U.S. Department of Agriculture

**Debt as a Percentage of Total Liabilities and Net Worth for All U.S. Supermarket Companies**



Source: Food Marketing Institute, *Annual Financial Review*

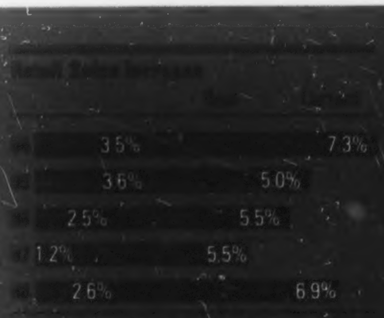
## Sales and Margins

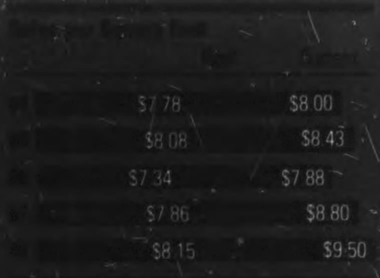
In current dollars, retail supermarket sales in the companies surveyed grew 6.9 percent over 1987 or 2.6 percent when adjusted for inflation. Sales in identical stores (those stores open during the entire two-year period) grew 5.5 percent in current dollars or 1.3 percent when adjusted for inflation. Both the current dollar figures exceeded the inflation rate of 4.2 percent, indicating a strong and healthy performance for the industry as a whole.

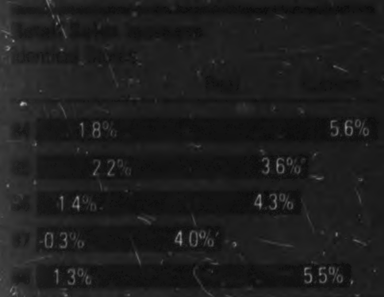
Gross margin percentages reported for 1988 were in line with previous years' numbers. Firms with their own warehouse reported a 23.9 percent gross margin in 1988; those without their own warehouse reported 22.2 percent. These percentages are for supermarket companies overall. Gross margins for individual stores vary, depending on such things as local market conditions and the store format.

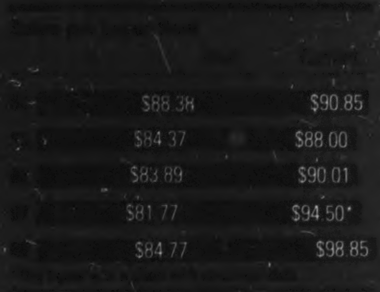
## Store Development

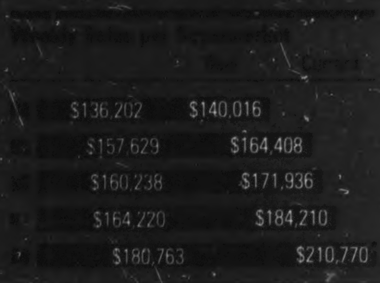
Slightly more stores were closed than were opened in 1988. Over 60 percent of the closed stores were conventionals. New store construction trends in the past few years have emphasized larger stores. The 1988 figures indicated a slight reversal with a median new store size of 40,800 total square feet, compared with almost 47,000 square feet in 1987. The median supermarket size overall in North America was 31,415 square feet, compared with 31,000 in 1987. Large stores will continue to be built, but the 1988 data show that they are not the only answer in the competitive market.

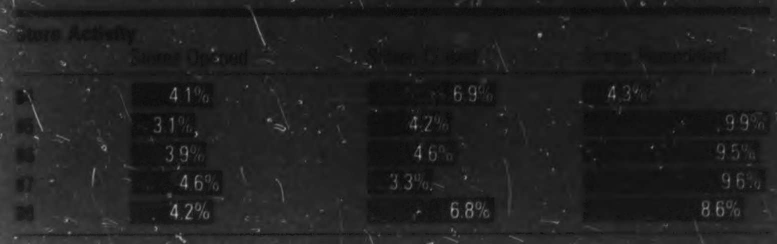


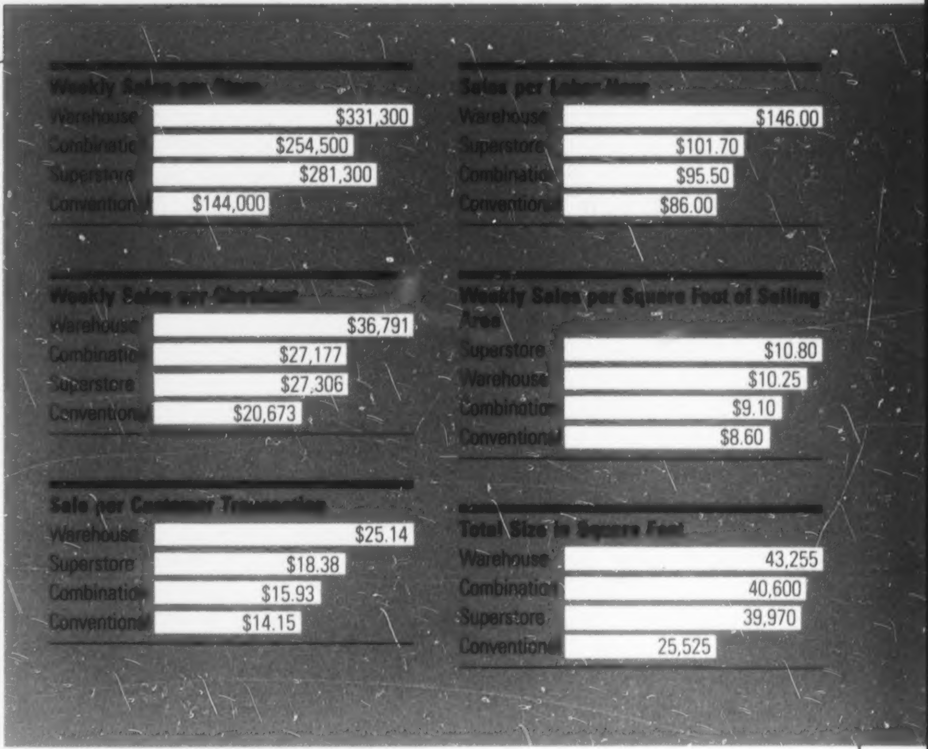












Vigorous remodeling activity exemplifies the aggressive stance taken by supermarket companies to compete in the tight markets of the 1980s. In 1988, 8.6 percent of the stores in operation on December 31 had undergone a remodeling costing at least $50,000. Although slightly fewer stores were remodeled in 1988 than in the past three years, it is still much higher than the number of newly constructed stores. It costs much less to remodel stores than build new ones: $20 per square foot in 1988, compared with $90.

**Operations**

Store data for the past few years show the fruits of more efficient operating methods as the industry operates fewer but more productive stores. The median weekly sales for the stores surveyed was $210,770 in 1988 or $180,763 when adjusting for inflation. This represents a 33 percent increase in real dollars from the 1984 figure. In current dollars, the median sales per square foot were $9.50 in 1988 or $8.15 in real dollars, a 5 percent increase in real dollars from 1984, indicating the industry is growing more efficient in its operations through better merchandising and technology.

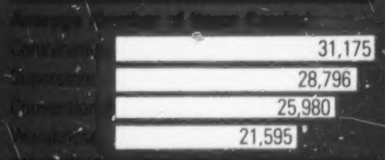
The total number of items available in the average supermarket was 26,430 in 1988, an 8 percent rise from 24,531 in 1987. The 1988 increase was smaller than the double-digit increases in 1987 and 1986.

Median sales per labor hour in 1988 were $98.85. Unlike some of the other productivity measures, the sales per labor hour figure has remained fairly steady in real terms for the past five years. It is likely that this trend reflects the increase in the number of labor-intensive service departments, which may negate the effects of more efficient labor in other areas of the store. Labor is a supermarket's biggest expense, accounting for about 11 percent of annual sales.

Plastic grocery bags are now a standard feature in supermarkets. In 1988, almost 9 out of 10 (89.9 percent) of the participating stores were offering their customers a choice of paper or plastic bags; 4.5 percent offered plastic exclusively and 6.3 percent offered only paper.

The participating firms spent a median of 1.1 percent of their annual sales on advertising, the bulk of which was done through printed media. Less than 14 percent of advertising dollars were devoted to radio and television and only 5.5 percent to in-store coupons.

Average Number of Items Carried



| Operating Results of Stores in Companies With the Greatest Annual Sales Growth | |
|---|---|
| Weekly Sales per Store | $264,990 |
| Weekly Sales per Checkout | $28,917 |
| Sales per Labor Hour | $90.11 |
| Weekly Sales per Square Foot of Selling Area | $9.50 |
| Total Size in Square Feet | 40,200 |
| Percentage of Stores Scanning | 79.6% |

| Operating Results for One-Store Companies | |
|---|---|
| Weekly Sales per Store | $105,000 |
| Weekly Sales per Checkout | $19,815 |
| Sales per Labor Hour | $74.44 |
| Weekly Sales per Square Foot of Selling Area | $9.04 |
| Total Size in Square Feet | 18,500 |
| Average Number of Items | 16,834 |

| Operating Results for Two to 10 Stores | |
|---|---|
| Weekly Sales per Store | $150,000 |
| Weekly Sales per Checkout | $21,000 |
| Sales per Labor Hour | $83.43 |
| Weekly Sales per Square Foot of Selling Area | $9.45 |
| Total Size in Square Feet | 25,000 |
| Average Number of Items | 17,982 |

For the second straight year, this study examined characteristics of companies in the top 25 percent of annual sales growth. Their stores were 28 percent larger, at a median of 40,200 sq. ft. Their weekly sales per store were $264,990—26 percent larger than the median for all stores. Sales per labor hour figures reported by these firms were not higher than those for stores overall have more service departments. For example, 79.3 percent of stores in firms with the highest annual sales growth offered a deli with carryout, compared with 71.5 percent of stores overall. Fifty-nine percent featured fresh seafood vs. 47.4 percent of stores overall, and 50 percent had service meat departments, compared with 32 percent of stores overall. Their stores were technologically more advanced: 79.6 percent were scanning compared with 59.7 percent of stores overall. These companies' stores carried an average 23,360 items compared with 26,430 overall, indicating a more focused merchandising strategy.

The Speaks study also assessed characteristics of various store formats. As the graphs show, the warehouse stores represented in this year's study were larger than all others. Productivity ratios were also higher. They carried fewer items than the other formats. The low pricing structure inherent in the warehouse concept requires enormous volume to maintain profitability. For example, an FMI study of independent store performance found a median gross margin of 16.5 percent for warehouse stores, compared with 21.5 percent for conventional stores in the same study.

**Solid Waste**

Solid waste is one of the most critical issues facing the food distribution industry in the late 1980s. One-third of the nation's landfills will be full within the next five years, according to the Environmental Protection Agency (EPA). Many of the products and types of packaging that contribute to the solid waste stream flow through the supermarket distribution system. Because of their visibility and prominence, food retailers are often targeted by government policy makers as a point at which the problem can be addressed. The Food Marketing Institute recently adopted an industry policy for comprehensive solid waste management. The institute is now working with its members to implement the policy. A copy is available from the FMI government relations department.

Speaks 1989 collected data on several aspects of solid waste management in the supermarket industry. Over three-quarters of the stores surveyed were involved in some form of recycling in 1988. Almost all (99.6 percent) were recycling cardboard. Just under nine in 10 (85.8 percent) were recycling meat trimmings. Other items being recycled: aluminum cans, bottles/glass and newspaper/paper. Almost 46 percent of the responding companies used a centralized product reclaim center to handle damaged products.

As the solid waste problem grows, the cost of disposal rises. The median waste disposal fee per ton in December 1988 was $43.10, up from $32.00 in December 1987.

# *Employees*

## The Labor Shortage

Almost 3.1 million people were working in food stores in 1988, over 42 percent more than 5 years ago, according to the U.S. Bureau of Labor Statistics. This is still not enough. Overall, a median of five percent of the available positions in a typical supermarket were going unfilled in 1988. The results indicate that the labor shortage is a problem throughout the country, though it is more severe in certain regions. In the New England and the Middle Atlantic states, a median of 10 percent of the available positions in a typical store were going unfilled.

Over 28 percent of the respondents said they were having difficulty recruiting store managers, 49.4 percent were having difficulty recruiting full-time store personnel below the level of manager and almost nine-tenths (89.0 percent) were having trouble recruiting part-time personnel. All of the respondents in New England indicated trouble recruiting part-time store personnel. Supermarkets had less difficulty in the East North Central and the West South Central regions. A median of 2 percent of the available positions in the East North Central were going unfilled, which compares to 1.5 percent in the West South Central region.

The aging of the population is causing problems for retailers who traditionally depended on younger people to staff their stores. People aged 14 to 24 comprised 21.4 percent of the U.S. population in 1980, but this segment is expected to drop to 15.6 percent by 1990. While the number of young people is dropping, senior citizens are on the rise. People 65 and over are expected to make up 12.7 percent of the population in 1990 compared with 11.3 percent in 1980.

## Recruitment and Retention

This year's Speaks examined the current state of recruitment and retention activities and looked at possibilities for the future. More traditional recruiting methods, such as newspaper advertising and hiring in individual stores, were used most often. Firms in the areas with the toughest recruiting problems put forth the most effort. For example, an average of 65.6 percent of all the participating companies posted newspaper ads for recruiting, compared with 93.3 percent and 77.8 percent in the New England and Middle Atlantic regions respectively. Over 44 percent of the Middle Atlantic firms are advertising positions on radio, compared with 14.3 percent nationwide. On the other hand, fewer participating firms in the East North Central and West South Central regions, where the labor shortage is less severe, were actively recruiting. Only 45.5 percent of the West South Central companies used newspaper ads for example.

Many companies were involved in recruiting efforts within the community, such as participation in high school and college job fairs, high school and junior high school career awareness programs, the Distributive Education Clubs of America (DECA) and other vocational awareness programs. Larger firms (11+ stores) made much greater use of these options than smaller companies. Again, those firms in regions with a larger labor shortage were more likely to use these techniques.

Many firms recruit among specific demographic groups not traditionally employed by supermarkets. Over 40 percent were recruiting physically handicapped and developmentally disabled people. Senior citizens were targeted by 86.2 percent of the responding firms. Almost 44 percent of the firms recruiting from these groups were offering special training to supervisors on the special needs of these people once hired.

Since retention of good employees is probably the most important issue in today's tight labor market, this study examines the current level of use of various benefits and programs in retail supermarket companies.

In addition to benefits and perquisites, employees' physical and mental health play an important role in motivating job performance. Just over a fifth (22.3 percent) of the participating firms were offering Employee Assistance Plans (EAPs). Of the 78 percent of firms without an EAP in 1988, 26.4 percent planned to implement one within the next two years. Most of those firms with EAPs (61.0 percent) sent their people to outside programs, although one-quarter (24.4 percent) operated their own program.

| Percentage of Companies Recruiting Employees by: | |
|---|---|
| [illegible] in Individual Stores | 75.1% |
| [illegible] within the Company | 67.7% |
| Newspaper Advertising | 59.0% |
| Working with State Employment Agencies | 50.2% |
| [illegible] JTPA & Other [illegible] Programs | [illegible] |
| Participating in High School [illegible] | 46.5% |
| Recruiting through High School or [illegible] | 45.5% |
| Visiting College Career Centers | 30.2% |
| Participating in College Career Days | 24.9% |

| Percentage of Companies Recruiting: | |
|---|---|
| Senior Citizens | 58.2% |
| Members of Minority Groups | 54.7% |
| Developmentally Disabled | 43.5% |
| Physically Handicapped | 40.6% |

| Percentage of Companies Offering: | |
|---|---|
| Paid Vacation | 99.4% |
| Paid Holidays | 97.5% |
| Life Insurance | 93.5% |
| Retirement Plans | 74.6% |
| Paid Sick Leave | 61.2% |
| Personal Holidays | 59.7% |
| Tuition Reimbursement | 25.1% |
| [illegible] | 10.0% |

| Percentage of Companies with Employee Programs: | |
|---|---|
| Employee Associations or Special Functions | 56.7% |
| Outstanding Employees Given Special Recognition | 74.7% |
| Customer Awards Given with Special Recognition | 50.5% |
| Recognition of Outstanding Public Service by Employees | 53.3% |
| Profit Sharing Offered to Non-management Employees | 10.6% |
| Employees Actively Involved with Problem Solving at the Store Level | 73.1% |

Some companies had a combination of the two. Over 80 percent had an EAP available for all employees, full-time and part-time. The majority (84.6 percent) of the EAPs were so-called "broadbrush" programs, while the remainder covered alcohol and drug problems only. In 1988, 20.2 percent of the responding firms had a formal AIDs policy. Both AIDs policies and EAPs were much more prevalent in larger firms (11+ stores).

Most of the respondents offered the more traditional benefits such as paid vacations, paid sick leave and personal holidays. Over 48 percent have health insurance for both full- and part-timers. The remaining 52 percent provided health insurance to full-timers only.

Child care is one of the "non-traditional" benefits. Only 1.6 percent of the respondents offered it in 1988. Yet when asked about benefits to be considered for the future, 15.3 percent mentioned child-care as a possibility.

Frequent performance reviews are seen as one way to help employees remain satisfied in their jobs. In 1988, half of the participants were conducting performance reviews once a year, 35.6 percent twice a year. Very few respondents were conducting reviews three or more times a year. However, 40.4 percent considered it valuable to increase the frequency of reviews in the future.

Several companies are looking for guidance from their employees. Almost 40 percent have conducted an employee attitude survey in the past three years, and over two-thirds (67.7 percent) conducted exit interviews with departing employees. Of the companies involved, 81.7 percent are using the results as a part of their strategic planning.

## Store Manager Profile

This survey was designed to provide a profile of the store manager in supermarket chains (companies with 10+ stores) and to forecast the role of the store manager five years from now.

In 1988, 94.9 percent of the managers in participating companies were men. The majority (69.4 percent) were high school graduates. Almost 28 percent had either a bachelor's or associate's degree. Less than two percent were not high school graduates and only 1.1 percent had graduate degrees. When asked about the future, human resource executives believe that the proportion of managers with academic degrees will increase to almost 45 percent, while those with only a high school education will decrease to just under 55 percent.

The majority of store managers are under the age of 50 and have been in their positions for 15 years or less. Almost half the managers in 1988 were between the ages of 31 and 40 and just over one-quarter were between the ages of 41 and 50. Only 10 percent were 51 or older. The largest percentage of managers (36.3 percent) have been in their positions between one and five years; the next largest percentage (29.2 percent) have been managers for six to 10 years.

**Where Store Managers Came From**

|  | 1988 | Expected 1993 |
|---|---|---|
| Traditional "Up the Ranks" Route | 84.3% | 77.3% |
| College into Management Training Program | 4.6% | 12.8% |
| Management Jobs in Other Industries | 1.6% | 2.8% |
| Other Food Retailers | 9.4% | 6.9% |

**Highest Educational Level Reached**

|  | 1988 | Expected in 1993 |
|---|---|---|
| High School Diploma | 69.4% | 54.6% |
| Associate's Degree | 13.1% | 16.4% |
| Bachelor's Degree | 14.8% | 24.8% |
| Graduate Degree | 1.1% | 1.6% |
| No High School Diploma | 1.6% | 0.6% |

**Store Manager Demographics**

|  |  |
|---|---|
| Male | 94.9% |
| Female | 5.1% |
| **Percentage in the Following Age Groups** |  |
| 20 to 30 | 16.4% |
| 31 to 40 | 48.2% |
| 41 to 50 | 25.2% |
| 51 + | 10.1% |
| **Percentages in Their Present Position for:** |  |
| 1 to 5 Years | 36.3% |
| 5 to 10 Years | 29.2% |
| 11 to 15 Years | 19.6% |
| 16 to 20 Years | 8.5% |
| 21 + Years | 6.4% |

**Store Manager Influence**

|  | None | Some | Quite a Lot | Most | Almost All |
|---|---|---|---|---|---|
| Hiring of Part-time Employees | 1.7% | 13.3% | 6.7% | 5.0% | 73.3% |
| Firing of Part-time Employees | 1.7% | 3.3% | 13.3% | 20.0% | 61.7% |
| Hiring of All Department Managers | 5.0% | 11.7% | 15.0% | 20.0% | 46.7% |
| Firing of All Department Managers | 1.7% | 6.7% | 10.0% | 38.3% | 43.3% |
| Store policies | — | 45.0% | 20.0% | 20.0% | 15.0% |
| Pricing | 35.0% | 53.3% | 5.0% | — | 6.7% |
| Pricing Markdowns | 11.7% | 58.3% | 10.0% | 10.0% | 10.0% |
| Selection of Department Heads | 6.7% | 35.0% | 26.7% | 23.3% | 8.3% |
| Merchandise Selection | 20.0% | 56.7% | 13.3% | 3.3% | 6.7% |
| Selecting Sale Items | 50.0% | 43.3% | 1.7% | — | 5.0% |

Because store management may not be a lifetime occupation for most people, this study examined the career path of store managers: how they came to that position and where they went as they moved on. The majority of managers in the responding companies (84.3 percent) took the traditional "up-the-ranks" route within the company. Only 4.6 percent came from college directly into a management training program. The remainder came from other foor retailers or management jobs in other industries. The respondents believe this situation will change in the next five years with almost 13 percent recruited out of college into a management training program and the percentage of those coming up through the ranks declining. On a related note, it took an average of 4.7 years to reach the management position from the time of entering the manager training program.

In addition to standard techniques such as interviews and application blanks, a substantial percentage of participants were using psychological tests (30.0 percent) and performance tests (41.7 percent) to evaluate candidates.

Over 15 percent of the store managers in participating companies left their position in 1988. Where did they go? Just over four in 10 left their companies entirely. Of those who left their companies, one in five also left the supermarket industry. About 14 percent of those leaving store management, or 2.1 percent of all store managers, stepped down to another position in 1988. Seven percent moved to a headquarters position, such as district manager or merchandiser.

Forty-five percent of the responding firms had formal education programs for their managers. The most popular topics were in the general scope of management rather than technical areas. Over 85 percent included planning and organizing, motivation, performance evaluation, counseling and discipline, and delegation. All of the participants included communication in the education program.

The study also examined some of the influence and responsibilities of store managers. Managers generally had most or all the responsibility for the hiring and firing of part-timers and slightly less influence in personnel decisions regarding department managers. When asked to rate the influence store managers exercise in the development of marketing/merchandising and other policies, 62.5 percent said "some" influence and 27.1 percent said "quite a lot."

# Loss Prevention

The Loss Prevention section of the 1989 Speaks addressed both the types and amount of store losses and examined some of methods used to control losses, such as personnel and security devices.

The responses to questions about the amount of theft and value of the cash/merchandise taken were spread over a wide range, depending on the individual circumstances of the participants.

Shoplifting accounted for an average of 27.1 percent of total losses from theft, although the responses to this question varied widely. Most fell between 10 and 50 percent.

A median of 15 shoplifters were apprehended per store, with the middle 50 percent of the responses falling between 7 and 30. The number of shoplifters apprehended is a function of the actual number of shoplifters as well as the quality and intensity of the individual firm's commitment to reducing this form of theft. For example, the median number of shoplifters apprehended in those companies with a full-time loss prevention person was 23—53 percent higher than the overall number. As would be expected, those firms who spent more on loss prevention expenses apprehended more shoplifters. A median of 0.10 percent of annual sales was budgeted to security/loss prevention. (middle range: 0.07 percent to 0.26 percent) Those firms who spent 0.30 percent or more apprehended a median of 35 shoplifters per store, compared with the overall median of 15. Of the shoplifters apprehended, nine were arrested and 6.5 were prosecuted, with a conviction rate of 95 percent. The conviction rate was fairly uniform, with a middle range of 80 percent to 100 percent.

Although there was a great variety in their number from company to company, most shoplifters were caught with about the same amount of merchandise. The average value of merchandise recovered was $12.70. Cigarettes were the most common target for thieves. Over 55 percent of the respondents said cigarettes were the item most often taken; 22.7 percent said health and beauty care (HBC) items were number one; 15.5 percent said meat was number one. The second most often taken items were evenly divided: 29.4 percent reported meat; 28.4 percent, HBC items; and 27.5 percent, cigarettes.

Currently, 31 states have enacted civil recovery standards which allow retailers to recoup some of the funds spent on security/loss prevention. Under this legislation, shoplifters are required to pay a civil fine directly to the retailer, over and above any criminal fines that may have been levied by the courts. In 1988, 35.4 percent of respondents were using civil recovery standards in shoplifting cases.

Employee theft accounted for an average of 52.9 percent of a company's total theft losses. As with the shoplifting percentage, this figure varied depending on individual circumstances. A median of 2.0 incidents of employee theft per store were discovered in responding companies. The average known value of the cash and/or merchandise taken was $104.00.

| **Theft Losses** | |
|---|---|
| Employee/Internal Theft | 52.9% |
| Shoplifting | 27.1% |
| Vendor Theft | 13.0% |
| Robberies | 3.4% |
| Burglaries | 3.6% |

Losses from robberies accounted for 3.4 percent of total theft losses. Participating companies experienced one robbery per 10 stores with a median of $966 worth of cash and/or merchandise taken in each instance.* The dollar amount taken in a robbery varied according to the individual circumstance. For example, the middle 50 percent of the responses in this case ranged from $300 to $2,100. Burglaries** accounted for 3.6 percent of theft losses with an average of three burglaries per store. Burglars netted a median of $600 in each case. Again the middle 50 percent of responses fell over a fairly wide spectrum, ranging from $210 to $1,500.

The year's Speaks study addressed several personnel and training issues in the loss prevention area. More companies employed plain clothes investigators rather than uniformed guards. The use of both uniformed and non-uniformed security personnel was more prevalent in larger firms. The same held true for the use of formal loss prevention manuals. Over 93 percent of the respondents provided some kind of formal loss prevention training for store managers. Almost 60 percent did so for store personnel below management.

Screening out potential thieves before they are employed is one technique used in the attempt to reduce losses. Written honesty tests are used in 30.2 percent of responding companies. Over 97 percent of those firms use them for store positions below management level, while 72.2 percent employed them for management applicants. A median of 35 percent of the applicants were rejected by these tests.

Almost 18 percent of the participating companies had a drug testing policy in place. Almost half of those (47.8 percent) used drug testing for both pre-employment and "for cause" (that is, following a serious accident involving injuries or high monetary losses).

*ROBBERY—is the taking of anything of value from the care, custody or control of a person or persons by force or threat of force or violence and/or by putting the victim in fear.

**BURGLARY—unlawful entry of any fixed structure, vehicle or vessel used for regular residence, industry or business, with or without force, with the intent to commit a felony or larceny.

**Shoplifting Statistics**

| | |
|---|---|
| Average Value of the Merchandise Recovered in Each Instance | $12.70 |

Percentage of Respondents Indicating the Type of Merchandise Most Often Taken

| | Most Often | Second Most Often | Third Most Often |
|---|---|---|---|
| Cigarettes | 55.5% | 27.5% | 4.7% |
| HBC Items | 22.7% | 28.4% | 32.1% |
| Meat | 15.5% | 29.4% | 33.6% |

**Companies Employing Security Personnel**

| | |
|---|---|
| Store Detectives | 64.4% |
| Uniformed Company Security Guards | 25.6% |
| Uniformed Contract Security Guards | 40.0% |
| Uniformed Police | 30.0% |
| Mystery Shoppers | 88.9% |

Percentage of Formal Loss Prevention Training Done

| | |
|---|---|
| In-House Classroom | 19.0% |
| Out-of-House Classroom | 3.2% |
| On-the-Job | 34.7% |
| Loss Prevention Manuals | 12.7% |
| Seminars, Workshops | 16.5% |
| Meetings | 13.5% |
| Other | 0.8% |

# Wholesale and Distribution Center Operations

All wholesale sales among the participating firms grew 4.6 percent in 1988. Almost 60 percent of the annual sales volume was attributed to independent stores, about 22 percent to company-owned stores and 13 percent to other food chains.

This year's study looked particularly at personnel issues in the distribution center. Wholesale centers were staffed by 279 employees, retail centers by 166 employees. Centers operated by combined retailer/wholesalers fell in the middle with 246 employees. Payroll costs accounted for a median of 2.3 percent of the total center volume at cost in the participating companies. The medians for specific components were 1.5 percent for hourly wages, 0.3 percent for supervisory, administration and clerical salaries, and 0.7 percent for payroll taxes and fringe benefits. Volume at cost, defined as all dry grocery shipments at cost from the center for one year including freight-in charges but excluding discounts and allowances, is the most effective base for comparing different centers.

Among the programs provided for employees, 47.5 percent of the respondents had an Employee Assistance Program (EAP) in place. Over three-quarters were so-called "broadbrush" programs with the remainder for alcohol and drugs only. Drug testing policies existed in several of the participating firms. Of the responding companies, over 54 percent tested warehouse personnel below the level of management, over 56 percent tested truck drivers, and 37 percent had the policy for center management.

Engineered labor standards were used by many more of the retailers in this year's study than the wholesalers (52.5 percent vs. 34.4 percent). Union involvement in the engineered labor standards is indicated by the fact that 67.2 percent of the firms with the majority of employees unionized were using standards, compared with only 31.1 percent of the firms with the majority non-unionized.

# *Methodology*

The *Food Marketing Industry Speaks, 1989* is based on data derived from five separate studies: retail supermarket operations: wholesale and distribution center operations: recruitment and retention: store manager profile. and loss prevention issues. The retail and wholesale/distribution center sections are done annually. Other topics are based on current needs and issues in the industry. Questionnaires were directed to selected executives in firms with 20 or more stores and to the CEO of those firms with fewer than 20 stores. Data from other FMI studies are included in the Speaks report when applicable. FMI defines a supermarket as retail food store with at least $2 million or greater in annual sales.

Retail surveys were returned by 231 companies. approximately 20 percent of those invited to participate. The sample consists of 92 one-store operators. 72 firms with two to 10 stores. 67 firms with 11 or more stores. These companies represented a total of 9.368 stores. Data for the recruitment and retention study were received from 189 companies: 52 one-store firms: 65 companies with two to 10 stores: and 72 with 11 or more stores. The store manager profile questionnaire was directed to human resource executives in firms with 10 or more stores: responses were received from 60 companies. Loss prevention surveys were completed by 129 companies. 39 one-store operations. 47 operations with two to 10 stores. and 43 with 11 or more stores. These responses represented a total of 8.258 stores. Wholesale and distribution center questionnaires were directed to wholesalers and self-distributing retailers: 62 companies responded.

**Index for Deflating FMI Data***

| | CPI Food at Home | % Increase |
|---|---|---|
| 1984 | 102.8 | 3.7% |
| 1985 | 104.3 | 1.4% |
| 1986 | 107.3 | 2.9% |
| 1987 | 111.9 | 4.3% |
| 1988 | 116.6 | 4.2% |

*1982 Dollars

**Sample Description for Food Marketing Industry Speaks, 1989**

**Retail Operations Questionnaire**

| (Base) Company Retail Sales (millions) | Sample Companies (231) |
|---|---|
| Under $10 | 36.4% |
| $10 - $30 | 17.7% |
| $31- $100 | 16.5% |
| $101 - $250 | 7.4% |
| $251 - $500 | 4.3% |
| Over $500 | 17.7% |

**Recruitment & Retention Questionnaire**

| (Base) Company Retail Sales (millions) | Sampla Companies (189) |
|---|---|
| Under $10 | 27.0% |
| $10 - $30 | 24.3% |
| $31 - $100 | 10.6% |
| $101 - $250 | 9.5% |
| $251 - $500 | 7.9% |
| Over $500 | 20.6% |

**Store Manager Profile Questionnaire**

| (Base) Company Retail Sales (millions) | Sample Companies (60) |
|---|---|
| Under $500 | 40.0% |
| $501 - $1 billion | 36.7% |
| Over $1 billion | 23.3% |

**Loss Prevention Issues Questionnaire**

| (Base) Company Retail Sales (millions) | Sample Companies (129) |
|---|---|
| Under $10 | 30.2% |
| $10 - $30 | 20.9% |
| $31 - $100 | 14.7% |
| $101 - $250 | 3.9% |
| $251 - $500 | 7.0% |
| Over $500 | 23.3% |

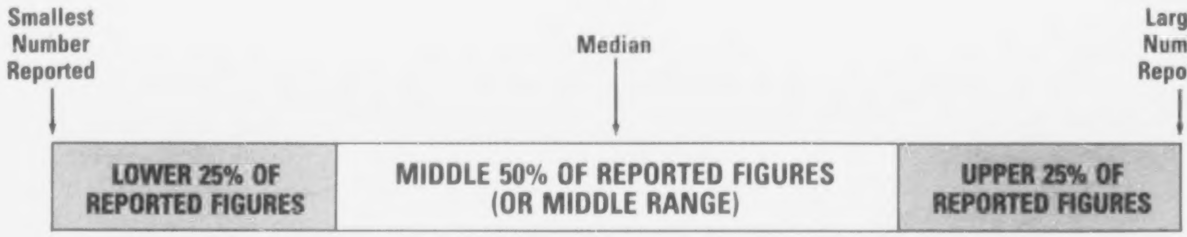
**Wholesale & Distribution Center Operations Questionnaire**

| (Base) Company Retail Sales (millions) | Sampla Companies (62) |
|---|---|
| Under $100 | 16.1% |
| $101 - $250 | 12.9% |
| $251 - $500 | 11.3% |
| Over $500 | 59.7% |

The majority of the facts and figures from which this study is derived are found in the *Detailed Tabulations from the Food Marketing Industry Speaks, 1989.* Unless otherwise noted, all data in these studies are medians. The median figure represents the midpoint of the figures for a particular measure, with one-half of the figures in an individual measure above it and one-half below. (See example below.) In calculating the median, individual data are weighted by the number of stores responding or annual sales where applicable. The median is a good indicator of "typical" performance because it is not distorted by a few unusually high or low values that may exist in a sample due to special circumstances. In analyzing the data and comparing it with individual company performance, it is also important to consider the "middle range." This represents the middle 50 percent of the responses, indicating that half the responses fell between two points, namely the upper and lower quartiles.

When measuring real growth in sales or productivity, FMI uses the food-at-home component of the Consumer Price Index (CPI) and its annual percentage increase as deflators. To deflate a dollar figure, the CPI food-at-home number is used. For example, to deflate the 1988 weekly sales per supermarket (see p. 10), divide the current, $210,770, by the 1988 food-at-home number (116.6) and then multiplies the result by 100 (210,770/116.6) x 100 = $180,763 "real weekly sales per supermarket." To deflate a percentage, such as the 1988 retail sales increase (p. 9), add one to the 1988 current dollar increase (1 + 069), then multiply this by the inverse of the 1988 food-at-home percentage change plus one (1/1.042). The result is 1.026 or 2.6 percent. The table on p. 18 charts the CPI food-at-home index and the percentage increase of the index for the past five years.

Many FMI publications discuss specific aspects of food distribution. Readers interested in the financial side of the industry should see the *Annual Financial Review.* Two other studies providing specific financial and productivity information are the *Supermarket Financial Operations Profile* and the *Operating Results of Independent Supermarkets.* Those desiring information on the consumer's view of supermarkets should refer to *Trends—Consumer Attitudes and the Supermarket.* Each of these studies is updated annually. Information on these and other publications can be obtained by completing the form at the back of this report. A complete publication catalogue is available from the FMI Publication Sales Department.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The Food Marketing Institute (FMI) is a nonprofit association conducting programs in research, education and public affairs on behalf of its 1,600 members — food retailers and wholesalers and their customers in the United States and overseas. FMI's domestic member companies operate approximately 17,000 retail food stores with a combined annual sales volume of $180 billion — more than half of all grocery sales in the United States. FMI's retail membership is composed of large multi-store chains, small regional firms and independent supermarkets. Its international membership includes more than 200 members from over 50 nations.

# FOREWORD

This publication is the companion report to The Food Marketing Industry Speaks, 1989. It contains the detailed tabulations for the information summarized in that report.

An annual survey of food wholesalers and retailers is the primary source of information for this report. Any data not taken from FMI's Speaks surveys are indicated by a footnote.

Data are for 1988. Company sales data are reported on an annual basis; productivity data, e.g. sales per labor hour, square foot or transaction, are reported on a weekly basis.

Except where noted, the term average is used to indicate mean figures. All other figures are medians. A median represents the halfway or middle figure when all figures are listed in order from smallest to largest. Data are presented only when four or more companies in a category answered the question, except for distribution centers when it is three or more.

Other subject areas explored in depth this year are recruitment and retention, a store manager profile and loss prevention.

Data for store profiles are found in Tables 15A and 15B. In these tables, sales and productivity figures are presented for four different types of grocery stores: conventional stores, superstores, combination stores, and warehouse stores.

In order to insure confidentiality of individual companies, some data within different subcategories have been changed plus or minus one percent.

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## TABLE 1A
## PROFILE OF PARTICIPANTS -- NUMBER OF SUPERMARKETS OPERATED

| | | ANNUAL SALES IN MILLIONS | | | | | | NUMBER OF STORES | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | ALL COMPANIES | UNDER $10 | $10-30 | $31-100 | $101-250 | $251-500 | $501+ | 1 | 2-10 | 11+ |
| TOTAL | 231 | 84 | 41 | 38 | 17 | 10 | 41 | 92 | 72 | 67 |
| 1 STORE OPERATORS | 39.8% | 86.9% | 41.5% | 5.3% | - | - | - | 100% | - | - |
| 2 - 10 STORE COMPANIES | 31.2 | 13.1 | 58.5 | 78.9 | 29.4 | 10.0 | 2.4 | - | 100.0 | - |
| 11 - 49 STORE COMPANIES | 13.4 | - | - | 13.2 | 70.6 | 90.0 | 12.2 | - | - | 46.3 |
| 50 + STORE COMPANIES | 15.6 | - | - | 2.6 | - | - | 85.4 | - | - | 53.7 |

## TABLE 1B
## PROFILE OF PARTICIPANTS -- NUMBER OF SUPERMARKETS OPERATED

| | | GEOGRAPHIC REGION OF HEADQUARTERS | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | ALL COMPANIES | NEW ENGLAND | MIDDLE ATLANTIC | EAST NORTH CENTRAL | WEST NORTH CENTRAL | SOUTH EAST | WEST SOUTH CENTRAL | MOUNTAIN | PACIFIC | CANADA |
| TOTAL | 231 | 17 | 29 | 56 | 15 | 38 | 15 | 13 | 31 | 17 |
| 1 STORE OPERATORS | 39.8% | 41.2% | 44.8% | 42.9% | 60.0% | 42.1% | 33.3% | 53.8% | 35.5% | - |
| 2 - 10 STORE COMPANIES | 31.2 | 29.4 | 17.2 | 41.1 | 6.7 | 34.2 | 26.7 | 15.4 | 41.9 | 35.3 |
| 11 - 49 STORE COMPANIES | 13.4 | 5.9 | 24.1 | 10.7 | 13.3 | 10.5 | 26.7 | 15.4 | 9.7 | 11.8 |
| 50 + STORE COMPANIES | 15.6 | 23.5 | 13.8 | 5.4 | 20.0 | 13.2 | 13.3 | 15.4 | 12.9 | 52.9 |

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

## TABLE 2A
## PROFILE OF PARTICIPANTS -- RETAIL SALES IN 1988

| | ALL COMPANIES | ANNUAL SALES IN MILLIONS | | | | | | NUMBER OF STORES | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | | UNDER $10 | $10-30 | $31-100 | $101-250 | $251-500 | $501+ | 1 | 2-10 | 11+ |
| TOTAL | 231 | 84 | 41 | 38 | 17 | 10 | 41 | 92 | 72 | 67 |
| UNDER 10 MILLION | 36.4% | 100% | - | - | - | - | - | 79.3% | 15.3% | - |
| 10 - 30 MILLION | 17.7 | - | 100.0 | - | - | - | - | 18.5 | 33.3 | - |
| 31 - 100 MILLION | 16.5 | - | - | 100.0 | - | - | - | 2.2 | 41.7 | 9.0 |
| 101 - 250 MILLION | 7.4 | - | - | - | 100.0 | - | - | - | 6.9 | 17.9 |
| 251 - 500 MILLION | 4.3 | - | - | - | - | 100.0 | - | - | 1.4 | 13.4 |
| OVER 500 MILLION | 17.7 | - | - | - | - | - | 100.0 | - | 1.4 | 59.7 |

## TABLE 2B
## PROFILE OF PARTICIPANTS -- RETAIL SALES IN 1988

| | ALL COMPANIES | GEOGRAPHIC REGION OF HEADQUARTERS | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | | NEW ENGLAND | MIDDLE ATLANTIC | EAST NORTH CENTRAL | WEST NORTH CENTRAL | SOUTH EAST | WEST SOUTH CENTRAL | MOUNTAIN | PACIFIC | CANADA |
| TOTAL | 231 | 17 | 29 | 56 | 15 | 38 | 15 | 13 | 31 | 17 |
| UNDER 10 MILLION | 36.4% | 29.4% | 27.6% | 44.6% | 40.0% | 47.4% | 33.3% | 46.2% | 32.3% | 5.9% |
| 10 - 30 MILLION | 17.7 | 17.6 | 24.1 | 19.6 | 26.7 | 7.9 | 20.0 | 15.4 | 22.6 | 5.9 |
| 31 - 100 MILLION | 16.5 | 23.5 | 10.3 | 19.6 | - | 18.4 | 13.3 | 7.7 | 19.4 | 23.5 |
| 101 - 250 MILLION | 7.4 | 5.9 | 6.9 | 7.1 | 6.7 | 5.3 | 13.3 | - | 9.7 | 11.8 |
| 251 - 500 MILLION | 4.3 | - | 6.9 | 3.6 | 6.7 | 5.3 | 6.7 | 15.4 | - | - |
| OVER 500 MILLION | 17.7 | 23.5 | 24.1 | 5.4 | 20.0 | 15.8 | 13.3 | 15.4 | 16.1 | 52.9 |

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

**TABLE 3A**
## PERCENTAGE OF OPERATION SUPPLIED BY:

| | ALL COMPANIES | ANNUAL SALES IN MILLIONS | | | | | | NUMBER OF STORES | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | | UNDER $10 | $10-30 | $31-100 | $101-250 | $251-500 | $501+ | 1 | 2-10 | 11+ |
| TOTAL | 216 | 76 | 40 | 37 | 16 | 10 | 37 | 84 | 70 | 62 |
| OWN WAREHOUSE | 37.5% | 32.5% | 9.7% | 13.2% | 13.5% | 41.7% | 38.3% | 19.8% | 24.9% | 41.9% |
| VOLUNTARY WHOLESALER | 1.4 | 40.2 | 37.7 | 15.1 | 10.2 | 3.0 | .8 | 40.7 | 1.6 | 1.1 |
| COOPERATIVE WHOLESALER | 19.1 | 18.1 | 18.4 | 21.3 | 30.4 | 2.7 | 19.3 | 17.0 | 4.8 | 23.9 |
| UNAFFILIATED WHOLESALER | 11.6 | 4.7 | 4.4 | 13.6 | 9.8 | 19.9 | 11.5 | 6.7 | 41.6 | 1.6 |
| DIRECT VENDOR DELIVERIES | 30.3 | 28.9 | 29.8 | 34.5 | 36.1 | 32.7 | 30.1 | 30.7 | 26.9 | 31.5 |

**TABLE 3B**
## PERCENTAGE OF OPERATION SUPPLIED BY:

| | ALL COMPANIES | GEOGRAPHIC REGION OF HEADQUARTERS | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | | NEW ENGLAND | MIDDLE ATLANTIC | EAST NORTH CENTRAL | WEST NORTH CENTRAL | SOUTH EAST | WEST SOUTH CENTRAL | MOUNTAIN | PACIFIC | CANADA |
| TOTAL | 216 | 17 | 25 | 51 | 15 | 38 | 13 | 13 | 28 | 16 |
| OWN WAREHOUSE | 37.5% | 73.2% | 45.1% | 52.6% | 57.2% | 19.1% | 65.9% | 63.5% | 61.2% | 37.0% |
| VOLUNTARY WHOLESALER | 1.4 | 1.0 | .9 | 7.5 | 7.3 | .7 | .8 | 4.6 | 2.7 | 0 |
| COOPERATIVE WHOLESALER | 19.1 | .1 | 18.0 | 6.8 | .7 | 42.6 | 5.7 | .8 | 9.7 | 3.1 |
| UNAFFILIATED WHOLESALER | 11.6 | 3.5 | 7.0 | 4.4 | .7 | .5 | 4.8 | .9 | 8.9 | 34.4 |
| DIRECT VENDOR DELIVERIES | 30.3 | 22.2 | 29.1 | 28.7 | 34.0 | 37.1 | 22.7 | 30.1 | 18.1 | 25.4 |

NOTE: DATA WEIGHTED BY 1988 SALES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

## TABLE 4

# MEDIAN PERCENTAGE OF OPERATIONS SUPPLIED BY OUTSIDE WHOLESALERS AND DIRECT VENDOR DELIVERIES

| | MEDIAN | MIDDLE RANGE | | NUMBER PARTICIPATING |
|---|---|---|---|---|
| ALL COMPANIES | 100.0% | 55.3% | 100.0% | 216 |
| COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS) | | | | |
| UNDER 10 MILLION | 100.0 | 100.0 | 100.0 | 76 |
| 10 - 30 MILLION | 100.0 | 100.0 | 100.0 | 40 |
| 31 - 100 MILLION | 100.0 | 80.0 | 100.0 | 37 |
| 101 - 250 MILLION | 100.0 | 75.5 | 100.0 | 16 |
| 251 - 500 MILLION | 66.3 | 35.0 | 77.2 | 10 |
| OVER 500 MILLION | 28.0 | 20.0 | 40.0 | 37 |
| GEOGRAPHIC REGION OF HEADQUARTERS | | | | |
| NEW ENGLAND | 100.0 | 25.0 | 100.0 | 17 |
| MID ATLANTIC | 100.0 | 77.2 | 100.0 | 25 |
| EAST NORTH CENTRAL | 100.0 | 50.0 | 100.0 | 51 |
| WEST NORTH CENTRAL | 100.0 | 51.5 | 100.0 | 15 |
| SOUTHEAST | 100.0 | 75.0 | 100.0 | 38 |
| WEST SOUTH CENTRAL | 100.0 | 91.0 | 100.0 | 13 |
| MOUNTAIN | 100.0 | 60.0 | 100.0 | 13 |
| PACIFIC | 100.0 | 83.8 | 100.0 | 28 |
| CANADA | 34.2 | 24.9 | 57.8 | 16 |
| NUMBER OF STORES | | | | |
| 1 STORE | 100.0 | 100.0 | 100.0 | 84 |
| 2 - 10 STORES | 100.0 | 85.0 | 100.0 | 70 |
| 10 + STORES | 35.3 | 24.8 | 85.0 | 61 |

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

## TABLE 5A
# MEDIAN PERCENTAGE CHANGE IN RETAIL SALES 1987 VS. 1988

| | MEDIAN | MIDDLE RANGE | | NUMBER PARTICIPATING |
|---|---|---|---|---|
| ALL COMPANIES | 6.9% | 2.9% | 12.8% | 229 |
| COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS) | | | | |
| UNDER 10 | 6.3 | 1.6 | 12.3 | 83 |
| 10 - 30 | 7.0 | 3.2 | 14.5 | 40 |
| 31 - 100 | 7.9 | 4.0 | 14.6 | 38 |
| 101 - 250 | 14.2 | 5.8 | 29.2 | 17 |
| 251 - 500 | 9.3 | 8.3 | 9.9 | 10 |
| OVER 500 | 5.7 | 4.1 | 10.7 | 41 |
| GEOGRAPHIC REGION OF HEADQUARTERS | | | | |
| NEW ENGLAND | 10.4 | 6.4 | 15.1 | 17 |
| MID ATLANTIC | 7.4 | 2.3 | 12.6 | 29 |
| EAST NORTH CENTRAL | 6.7 | 2.3 | 12.5 | 54 |
| WEST NORTH CENTRAL | 6.5 | 0 | 11.5 | 15 |
| SOUTHEAST | 6.7 | 3.6 | 12.5 | 38 |
| WEST SOUTH CENTRAL | 5.0 | 2.5 | 9.4 | 15 |
| MOUNTAIN | 8.3 | 5.3 | 11.3 | 13 |
| PACIFIC | 5.8 | 2.0 | 13.6 | 31 |
| CANADA | 9.4 | 4.8 | 15.4 | 17 |
| NUMBER OF STORES | | | | |
| 1 STORE | 7.2 | 2.3 | 12.3 | 90 |
| 2 - 10 STORES | 7.9 | 2.9 | 20.3 | 72 |
| 10 + STORES | 6.5 | 4.2 | 11.3 | 66 |

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

## TABLE 5B
# MEDIAN PERCENTAGE CHANGE IN RETAIL SALES 1987 VS. 1988

| | MEDIAN | MIDDLE RANGE | | NUMBER PARTICIPATING |
|---|---|---|---|---|
| **ALL COMPANIES** | | | | |
| TOTAL | 6.9% | 2.9% | 12.8% | 229 |
| BOTTOM ALL STORE GROWTH | 0 | -1.7 | 3.7 | 53 |
| TOP ALL STORE GROWTH | 15.4 | 12.5 | 24.0 | 53 |
| **1 STORE OPERATORS** | | | | |
| TOTAL | 7.2 | 2.3 | 12.3 | 90 |
| BOTTOM ALL STORE GROWTH | -.9 | -6.6 | 0 | 19 |
| TOP ALL STORE GROWTH | 15.4 | 12.5 | 21.7 | 29 |
| **2 - 10 STORE COMPANIES** | | | | |
| TOTAL | 7.9 | 2.9 | 20.3 | 72 |
| BOTTOM ALL STORE GROWTH | 1.2 | -3.6 | 11.8 | 16 |
| TOP ALL STORE GROWTH | 20.9 | 12.5 | 46.5 | 14 |
| **10 + STORE COMPANIES** | | | | |
| TOTAL | 6.5 | 4.2 | 11.3 | 66 |
| BOTTOM ALL STORE GROWTH | 3.7 | 1.3 | 6.5 | 18 |
| TOP ALL STORE GROWTH | 14.8 | 11.3 | 19.6 | 10 |

NOTE: STORE GROWTH BASED ON THE PERCENT CHANGE IN RETAIL SALES FOR ALL STORES IN 1987 VS. 1988.

TOP GROWTH STORES INCLUDE THE 25 PERCENT WITH THE GREATEST INCREASE. BOTTOM GROWTH STORES INCLUDE THE 25 PERCENT WITH THE SMALLEST INCREASE.

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

## TABLE 6A

# MEDIAN PERCENTAGE CHANGE IN RETAIL SALES FOR IDENTICAL STORES 1987 VS. 1988 **

| | MEDIAN | MIDDLE RANGE | | NUMBER PARTICIPATING |
|---|---|---|---|---|
| ALL COMPANIES | 5.5% | 1.8% | 11.0% | 212 |
| COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS) | | | | |
| UNDER 10 | 5.9 | 1.8 | 11.5 | 81 |
| 10 - 30 | 6.4 | 3.1 | 11.0 | 36 |
| 31 - 100 | 4.3 | .8 | 11.0 | 32 |
| 101 - 250 | 3.7 | .9 | 8.1 | 16 |
| 251 - 500 | 5.8 | 1.7 | 9.2 | 10 |
| OVER 500 | 4.7 | 1.5 | 8.9 | 37 |
| GEOGRAPHIC REGION OF HEADQUARTERS | | | | |
| NEW ENGLAND | 10.0 | 6.4 | 12.6 | 17 |
| MID ATLANTIC | 5.0 | 2.3 | 10.7 | 26 |
| EAST NORTH CENTRAL | 4.2 | 1.6 | 9.8 | 48 |
| WEST NORTH CENTRAL | 3.9 | 0 | 7.3 | 15 |
| SOUTHEAST | 3.8 | 0 | 10.3 | 37 |
| WEST SOUTH CENTRAL | 3.4 | 2.3 | 8.3 | 14 |
| MOUNTAIN | 6.3 | 4.7 | 16.9 | 12 |
| PACIFIC | 5.6 | 2.0 | 11.1 | 29 |
| CANADA | 6.1 | 3.2 | 15.4 | 14 |
| NUMBER OF STORES | | | | |
| 1 STORE | 7.2 | 2.3 | 12.3 | 90 |
| 2 - 10 STORES | 5.4 | 1.8 | 10.7 | 61 |
| 10 + STORES | 3.9 | 1.2 | 8.5 | 60 |

** IDENTICAL STORES ARE ONLY THOSE STORES OPEN DURING THE ENTIRE TWO-YEAR PERIOD OF 1987-1988

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

## TABLE 6B

# MEDIAN PERCENTAGE CHANGE IN RETAIL SALES FOR IDENTICAL STORES 1987 VS. 1988 **

|  | MEDIAN | MIDDLE RANGE |  | NUMBER PARTICIPATING |
|---|---|---|---|---|
| ALL COMPANIES |  |  |  |  |
| TOTAL | 5.5% | 1.8% | 11.0% | 212 |
| BOTTOM ALL STORE GROWTH | -.4 | -3.8 | 0 | 53 |
| TOP ALL STORE GROWTH | 14.4 | 12.5 | 21.0 | 53 |
| 1 STORE OPERATORS |  |  |  |  |
| TOTAL | 7.2 | 2.3 | 12.3 | 90 |
| BOTTOM ALL STORE GROWTH | -.9 | -6.6 | 0 | 19 |
| TOP ALL STORE GROWTH | 15.4 | 12.5 | 21.7 | 29 |
| 2 - 10 STORE COMPANIES |  |  |  |  |
| TOTAL | 5.4 | 1.8 | 10.7 | 61 |
| BOTTOM ALL STORE GROWTH | -1.1 | -9.3 | .6 | 16 |
| TOP ALL STORE GROWTH | 14.6 | 12.6 | 20.0 | 14 |
| 10 + STORE COMPANIES |  |  |  |  |
| TOTAL | 3.9 | 1.2 | 8.5 | 60 |
| BOTTOM ALL STORE GROWTH | 0 | -1.3 | .4 | 18 |
| TOP ALL STORE GROWTH | 13.2 | 11.9 | 16.1 | 10 |

** IDENTICAL STORES ARE ONLY THOSE STORES OPEN DURING THE ENTIRE TWO-YEAR PERIOD FOR 1987-1988

NOTE: STORE GROWTH BASED ON THE PERCENT CHANGE IN RETAIL SALES FOR ALL STORES IN 1987 VS. 1988.
TOP GROWTH STORES INCLUDE THE 25 PERCENT WITH THE GREATEST INCREASE. BOTTOM GROWTH STORES INCLUDE THE 25 PERCENT WITH THE SMALLEST INCREASE.

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

## TABLE 7A

## MEDIAN AVERAGE WEEKLY SALES (IN DOLLARS) PER SUPERMARKET IN 1988

| | MEDIAN | MIDDLE RANGE | | NUMBER PARTICIPATING |
|---|---|---|---|---|
| ALL STORES | $210770 | $164803 | $249259 | 9681 |
| COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS) | | | | |
| UNDER 10 | 84700 | 63461 | 120000 | 97 |
| 10 - 30 | 116000 | 85000 | 207846 | 88 |
| 31 - 100 | 121700 | 65400 | 165000 | 315 |
| 101 - 250 | 167000 | 117293 | 224000 | 275 |
| 251 - 500 | 224129 | 157005 | 337200 | 248 |
| OVER 500 | 210540 | 171038 | 249259 | 8658 |
| GEOGRAPHIC REGION OF HEADQUARTERS | | | | |
| NEW ENGLAND | 445846 | 315500 | 445846 | 357 |
| MID ATLANTIC | 175000 | 173500 | 175000 | 1872 |
| EAST NORTH CENTRAL | 249259 | 249259 | 249259 | 1647 |
| WEST NORTH CENTRAL | 217676 | 205390 | 217676 | 339 |
| SOUTHEAST | 137697 | 137697 | 147940 | 1873 |
| WEST SOUTH CENTRAL | 299570 | 148000 | 299570 | 318 |
| MOUNTAIN | 212650 | 209400 | 264990 | 1460 |
| PACIFIC | 316139 | 201300 | 339246 | 552 |
| CANADA | 241337 | 112440 | 246083 | 966 |
| NUMBER OF STORES | | | | |
| 1 STORE | 105000 | 70000 | 154000 | 89 |
| 2 - 10 STORES | 150000 | 98557 | 200000 | 317 |
| 10 + STORES | 210850 | 168721 | 249100 | 8948 |

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

## TABLE 7B

# MEDIAN AVERAGE WEEKLY SALES (IN DOLLARS) PER SUPERMARKET IN 1988

| | MEDIAN | MIDDLE RANGE | | NUMBER PARTICIPATING |
|---|---|---|---|---|
| ALL STORES | | | | |
| TOTAL | $210770 | $164803 | $249259 | 9681 |
| BOTTOM ALL STORE GROWTH | 137700 | 137697 | 157005 | 2103 |
| TOP ALL STORE GROWTH | 264990 | 264990 | 315500 | 1129 |
| 1 STORE OPERATORS | | | | |
| TOTAL | 105000 | 70000 | 154000 | 89 |
| BOTTOM ALL STORE GROWTH | 109985 | 65000 | 158000 | 18 |
| TOP ALL STORE GROWTH | 99688 | 67372 | 131384 | 28 |
| 2 - 10 STORE COMPANIES | | | | |
| TOTAL | 150000 | 98557 | 200000 | 317 |
| BOTTOM ALL STORE GROWTH | 120850 | 80650 | 173000 | 64 |
| TOP ALL STORE GROWTH | 180288 | 133000 | 314155 | 71 |
| 10 + STORE COMPANIES | | | | |
| TOTAL | 210850 | 168721 | 249259 | 8948 |
| BOTTOM ALL STORE GROWTH | 137600 | 137697 | 157005 | 2021 |
| TOP ALL STORE GROWTH | 265250 | 264990 | 315500 | 1030 |

NOTE: STORE GROWTH BASED ON THE PERCENT CHANGE IN RETAIL SALES FOR ALL STORES IN 1987 VS. 1988. TOP GROWTH STORES INCLUDE THE 25 PERCENT WITH THE GREATEST INCREASE. BOTTOM GROWTH STORES INCLUDE THE 25 PERCENT WITH THE SMALLEST INCREASE.

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

## TABLE 8A
# MEDIAN AVERAGE WEEKLY SALES (IN DOLLARS) PER CHECKOUT IN 1988

| | MEDIAN | MIDDLE RANGE | | NUMBER PARTICIPATING |
|---|---|---|---|---|
| ALL STORES | $24135 | $16063 | $27031 | 6523 |
| COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS) | | | | |
| UNDER 10 | 18050 | 14750 | 21540 | 92 |
| 10 - 30 | 19488 | 14079 | 24725 | 78 |
| 31 - 100 | 17900 | 13773 | 22650 | 212 |
| 101 - 250 | 19578 | 18687 | 23091 | 231 |
| 251 - 500 | 25250 | 24421 | 29747 | 200 |
| OVER 500 | 25194 | 16063 | 27031 | 5710 |
| GEOGRAPHIC REGION OF HEADQUARTERS | | | | |
| NEW ENGLAND | 34611 | 34526 | 34767 | 270 |
| MID ATLANTIC | 26497 | 25194 | 26645 | 620 |
| EAST NORTH CENTRAL | 23659 | 21085 | 24421 | 289 |
| WEST NORTH CENTRAL | 24186 | 23335 | 24310 | 339 |
| SOUTHEAST | 15300 | 15300 | 17000 | 1870 |
| WEST SOUTH CENTRAL | 27031 | 16756 | 27031 | 249 |
| MOUNTAIN | 26326 | 24595 | 28911 | 1412 |
| PACIFIC | 32355 | 25200 | 35127 | 482 |
| CANADA | 19670 | 16063 | 21939 | 695 |
| NUMBER OF STORES | | | | |
| 1 STORE | 19615 | 16000 | 22931 | 83 |
| 2 - 10 STORES | 21000 | 14079 | 23500 | 289 |
| 10 + STORES | 25200 | 16063 | 27673 | 5824 |

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

## TABLE 8B
## MEDIAN AVERAGE WEEKLY SALES (IN DOLLARS) PER CHECKOUT

| | MEDIAN | MIDDLE RANGE | | NUMBER PARTICIPATING |
|---|---|---|---|---|
| ALL COMPANIES | | | | |
| TOTAL | $24135 | $16063 | $27031 | 6523 |
| BOTTOM ALL STORE GROWTH | 15300 | 15300 | 16500 | 1830 |
| TOP ALL STORE GROWTH | 28911 | 28911 | 33805 | 984 |
| 1 STORE OPERATORS | | | | |
| TOTAL | 19615 | 16000 | 22931 | 83 |
| BOTTOM ALL STORE GROWTH | 17039 | 15000 | 20191 | 18 |
| TOP ALL STORE GROWTH | 19808 | 15313 | 24000 | 26 |
| 2 - 10 STORE COMPANIES | | | | |
| TOTAL | 21000 | 14079 | 23500 | 289 |
| BOTTOM ALL STORE GROWTH | 17900 | 13773 | 22300 | 58 |
| TOP ALL STORE GROWTH | 21208 | 16061 | 25863 | 68 |
| 10 + STORE COMPANIES | | | | |
| TOTAL | 25200 | 16063 | 27673 | 5824 |
| BOTTOM ALL STORE GROWTH | 15300 | 15300 | 15300 | 1754 |
| TOP ALL STORE GROWTH | 28911 | 28911 | 33805 | 890 |

NOTE: STORE GROWTH BASED ON THE PERCENT CHANGE IN RETAIL SALES FOR ALL STORES IN 1987 VS. 1988.

TOP GROWTH STORES INCLUDE THE 25 PERCENT WITH THE GREATEST INCREASE. BOTTOM GROWTH STORES INCLUDE THE 25 PERCENT WITH THE SMALLEST INCREASE.

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

## TABLE 9A
# MEDIAN AVERAGE SALE (IN DOLLARS) PER CUSTOMER TRANSACTION

| | MEDIAN | MIDDLE RANGE | | NUMBER PARTICIPATING |
|---|---|---|---|---|
| ALL STORES | $16.80 | $14.62 | $17.74 | 9664 |
| **COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)** | | | | |
| UNDER 10 | 12.17 | 10.00 | 14.50 | 89 |
| 10 - 30 | 14.59 | 11.74 | 18.50 | 84 |
| 31 - 100 | 14.02 | 12.50 | 16.90 | 242 |
| 101 - 250 | 15.76 | 12.18 | 23.00 | 238 |
| 251 - 500 | 19.34 | 14.67 | 21.92 | 248 |
| OVER 500 | 16.81 | 14.62 | 17.74 | 8763 |
| **GEOGRAPHIC REGION OF HEADQUARTERS** | | | | |
| NEW ENGLAND | 23.38 | 22.70 | 23.72 | 356 |
| MID ATLANTIC | 16.90 | 16.81 | 16.95 | 1832 |
| EAST NORTH CENTRAL | 17.74 | 17.74 | 17.92 | 1646 |
| WEST NORTH CENTRAL | 14.00 | 13.60 | 16.08 | 338 |
| SOUTHEAST | 14.15 | 14.05 | 14.80 | 1871 |
| WEST SOUTH CENTRAL | 15.00 | 14.90 | 16.27 | 316 |
| MOUNTAIN | 14.62 | 14.50 | 16.77 | 1466 |
| PACIFIC | 18.73 | 17.25 | 18.88 | 542 |
| CANADA | 17.25 | 13.63 | 21.63 | 1000 |
| **NUMBER OF STORES** | | | | |
| 1 STORE | 12.91 | 10.89 | 16.26 | 82 |
| 2 - 10 STORES | 15.82 | 13.00 | 20.00 | 310 |
| 10 + STORES | 16.77 | 14.62 | 17.74 | 8945 |

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

## TABLE 9B
## MEDIAN AVERAGE SALE (IN DOLLARS) PER CUSTOMER TRANSACTION IN 1988

| | MEDIAN | MIDDLE RANGE | | NUMBER PARTICIPATING |
|---|---|---|---|---|
| ALL COMPANIES | | | | |
| TOTAL | $16.80 | $14.62 | $17.74 | 9664 |
| BOTTOM ALL STORE GROWTH | 14.15 | 14.15 | 16.63 | 2086 |
| TOP ALL STORE GROWTH | 16.77 | 16.77 | 23.31 | 1129 |
| 1 STORE OPERATORS | | | | |
| TOTAL | 12.91 | 10.89 | 16.26 | 82 |
| BOTTOM ALL STORE GROWTH | 13.05 | 11.23 | 16.46 | 16 |
| TOP ALL STORE GROWTH | 13.70 | 10.95 | 15.57 | 28 |
| 2 - 10 STORE COMPANIES | | | | |
| TOTAL | 15.82 | 13.00 | 20.00 | 310 |
| BOTTOM ALL STORE GROWTH | 14.03 | 11.90 | 16.90 | 62 |
| TOP ALL STORE GROWTH | 15.79 | 13.00 | 27.27 | 71 |
| 10 + STORE COMPANIES | | | | |
| TOTAL | 16.77 | 14.62 | 17.74 | 8945 |
| BOTTOM ALL STORE GROWTH | 14.15 | 14.15 | 16.63 | 2068 |
| TOP ALL STORE GROWTH | 16.77 | 16.77 | 23.31 | 1030 |

NOTE: STORE GROWTH BASED ON THE PERCENT CHANGE IN RETAIL SALES FOR ALL STORES IN 1987 VS. 1988.

TOP GROWTH STORES INCLUDE THE 25 PERCENT WITH THE GREATEST INCREASE. BOTTOM GROWTH STORES INCLUDE THE 25 PERCENT WITH THE SMALLEST INCREASE.

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

## TABLE 10A

# MEDIAN AVERAGE SALES (IN DOLLARS) PER LABOR HOUR FOR STORE EMPLOYEES IN 1988

| | MEDIAN | MIDDLE RANGE | | NUMBER PARTICIPATING |
|---|---|---|---|---|
| ALL STORES | $98.85 | $82.19 | $101.70 | 8011 |
| COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS) | | | | |
| UNDER 10 | 73.33 | 63.10 | 94.00 | 79 |
| 10 - 30 | 80.00 | 74.57 | 98.75 | 78 |
| 31 - 100 | 77.24 | 74.70 | 92.00 | 287 |
| 101 - 250 | 86.67 | 80.69 | 96.95 | 251 |
| 251 - 500 | 80.59 | 78.22 | 91.74 | 225 |
| OVER 500 | 98.10 | 86.95 | 101.70 | 7091 |
| GEOGRAPHIC REGION OF HEADQUARTERS | | | | |
| NEW ENGLAND | 101.62 | 97.66 | 105.05 | 285 |
| MID ATLANTIC | 98.84 | 98.84 | 99.45 | 1843 |
| EAST NORTH CENTRAL | 76.77 | 71.67 | 80.69 | 296 |
| WEST NORTH CENTRAL | 91.74 | 87.09 | 93.00 | 338 |
| SOUTHEAST | 73.00 | 73.00 | 84.71 | 1867 |
| WEST SOUTH CENTRAL | 82.19 | 78.89 | 82.19 | 315 |
| MOUNTAIN | 101.70 | 99.69 | 102.35 | 1436 |
| PACIFIC | 121.05 | 115.00 | 129.00 | 577 |
| CANADA | 92.91 | 91.30 | 102.71 | 757 |
| NUMBER OF STORES | | | | |
| 1 STORE | 74.44 | 65.79 | 92.86 | 74 |
| 2 - 10 STORES | 83.43 | 76.00 | 105.00 | 286 |
| 10 + STORES | 98.90 | 82.19 | 101.70 | 7324 |

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

## TABLE 10B
# MEDIAN AVERAGE SALES (IN DOLLARS) PER LABOR HOUR FOR STORE EMPLOYEES IN 1988

| | MEDIAN | MIDDLE RANGE | | NUMBER PARTICIPATING |
|---|---|---|---|---|
| **ALL COMPANIES** | | | | |
| TOTAL | $98.85 | $82.19 | $101.70 | 8011 |
| BOTTOM ALL STORE GROWTH | 73.00 | 73.00 | 86.95 | 2138 |
| TOP ALL STORE GROWTH | 98.11 | 97.66 | 99.69 | 978 |
| **1 STORE OPERATORS** | | | | |
| TOTAL | 74.44 | 65.79 | 92.86 | 74 |
| BOTTOM ALL STORE GROWTH | 82.02 | 68.47 | 102.20 | 16 |
| TOP ALL STORE GROWTH | 72.00 | 62.38 | 83.33 | 25 |
| **2 - 10 STORE COMPANIES** | | | | |
| TOTAL | 83.43 | 76.00 | 105.00 | 286 |
| BOTTOM ALL STORE GROWTH | 83.43 | 76.00 | 104.66 | 58 |
| TOP ALL STORE GROWTH | 99.06 | 80.00 | 120.28 | 67 |
| **10 + STORE COMPANIES** | | | | |
| TOTAL | 98.90 | 82.19 | 101.70 | 7324 |
| BOTTOM ALL STORE GROWTH | 73.00 | 73.00 | 86.95 | 2064 |
| TOP ALL STORE GROWTH | 99.40 | 97.66 | 99.69 | 886 |

NOTE: STORE GROWTH BASED ON THE PERCENT CHANGE IN RETAIL SALES FOR ALL STORES IN 1987 VS. 1988.

TOP GROWTH STORES INCLUDE THE 25 PERCENT WITH THE GREATEST INCREASE. BOTTOM GROWTH STORES INCLUDE THE 25 PERCENT WITH THE SMALLEST INCREASE.

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

## TABLE 11A

# MEDIAN AVERAGE WEEKLY SALES (IN DOLLARS) PER SQUARE FOOT OF SELLING AREA IN 1988

| | MEDIAN | MIDDLE RANGE | | NUMBER PARTICIPATING |
|---|---|---|---|---|
| ALL STORES | $9.50 | $7.22 | $10.02 | 9468 |
| **COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)** | | | | |
| UNDER 10 | 7.05 | 5.70 | 9.65 | 95 |
| 10 - 30 | 8.00 | 5.85 | 11.25 | 85 |
| 31 - 100 | 6.64 | 4.86 | 7.64 | 306 |
| 101 - 250 | 7.24 | 5.78 | 9.29 | 230 |
| 251 - 500 | 7.04 | 5.76 | 10.90 | 248 |
| OVER 500 | 9.63 | 8.65 | 10.02 | 8504 |
| **GEOGRAPHIC REGION OF HEADQUARTERS** | | | | |
| NEW ENGLAND | 15.19 | 13.12 | 15.90 | 356 |
| MID ATLANTIC | 8.89 | 8.89 | 10.02 | 1844 |
| EAST NORTH CENTRAL | 9.63 | 8.80 | 9.63 | 1552 |
| WEST NORTH CENTRAL | 9.10 | 7.05 | 12.09 | 318 |
| SOUTHEAST | 4.77 | 4.77 | 6.77 | 1873 |
| WEST SOUTH CENTRAL | 10.21 | 6.12 | 10.21 | 318 |
| MOUNTAIN | 9.70 | 9.50 | 10.25 | 1467 |
| PACIFIC | 11.93 | 9.83 | 13.27 | 536 |
| CANADA | 9.18 | 6.66 | 10.88 | 907 |
| **NUMBER OF STORES** | | | | |
| 1 STORE | 8.04 | 5.91 | 10.98 | 86 |
| 2 - 10 STORES | 8.45 | 5.57 | 11.70 | 306 |
| 10 + STORES | 9.05 | 7.05 | 9.70 | 8749 |

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

## TABLE 11B

# MEDIAN AVERAGE WEEKLY SALES (IN DOLLARS) PER SQUARE FOOT OF SELLING AREA

| | MEDIAN | MIDDLE RANGE | | NUMBER PARTICIPATING |
|---|---|---|---|---|
| ALL COMPANIES | | | | |
| TOTAL | $9.50 | $7.22 | $10.02 | 9468 |
| BOTTOM ALL STORE GROWTH | 4.77 | 4.77 | 8.28 | 2103 |
| TOP ALL STORE GROWTH | 9.50 | 9.50 | 13.12 | 1063 |
| 1 STORE OPERATORS | | | | |
| TOTAL | 8.04 | 5.91 | 10.98 | 86 |
| BOTTOM ALL STORE GROWTH | 7.43 | 5.90 | 11.02 | 18 |
| TOP ALL STORE GROWTH | 7.21 | 6.00 | 9.41 | 27 |
| 2 - 10 STORE COMPANIES | | | | |
| TOTAL | 8.45 | 5.57 | 11.70 | 306 |
| BOTTOM ALL STORE GROWTH | 7.94 | 5.50 | 9.77 | 64 |
| TOP ALL STORE GROWTH | 9.51 | 8.99 | 14.11 | 65 |
| 10 + STORE COMPANIES | | | | |
| TOTAL | 9.05 | 7.05 | 9.70 | 8749 |
| BOTTOM ALL STORE GROWTH | 4.77 | 4.77 | 8.28 | 2021 |
| TOP ALL STORE GROWTH | 9.50 | 9.50 | 13.12 | 971 |

NOTE: STORE GROWTH BASED ON THE PERCENT CHANGE IN RETAIL SALES FOR ALL STORES IN 1987 VS. 1988.

TOP GROWTH STORES INCLUDE THE 25 PERCENT WITH THE GREATEST INCREASE. BOTTOM GROWTH STORES INCLUDE THE 25 PERCENT WITH THE SMALLEST INCREASE.

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

### TABLE 12A

## MEDIAN TOTAL SIZE (IN SQUARE FEET) OF A SUPERMARKET

| | MEDIAN | MIDDLE RANGE | | NUMBER PARTICIPATING |
|---|---|---|---|---|
| ALL STORES | 31415 | 28000 | 36970 | 9670 |
| COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS) | | | | |
| UNDER 10 | 17000 | 13200 | 22000 | 98 |
| 10 - 30 | 20000 | 15400 | 25000 | 85 |
| 31 - 100 | 19571 | 13850 | 26000 | 311 |
| 101 - 250 | 25500 | 20000 | 30920 | 275 |
| 251 - 500 | 43000 | 35000 | 100000 | 200 |
| OVER 500 | 32220 | 28000 | 36970 | 8701 |
| GEOGRAPHIC REGION OF HEADQUARTERS | | | | |
| NEW ENGLAND | 38587 | 38027 | 40000 | 357 |
| MID ATLANTIC | 28000 | 27351 | 28000 | 1873 |
| EAST NORTH CENTRAL | 36970 | 36970 | 36970 | 1640 |
| WEST NORTH CENTRAL | 46000 | 35090 | 46000 | 339 |
| SOUTHEAST | 28800 | 28800 | 28800 | 1873 |
| WEST SOUTH CENTRAL | 38202 | 25530 | 38202 | 318 |
| MOUNTAIN | 32500 | 32200 | 40200 | 1420 |
| PACIFIC | 36000 | 30993 | 42730 | 587 |
| CANADA | 30000 | 18000 | 36000 | 966 |
| NUMBER OF STORES | | | | |
| 1 STORE | 18500 | 13300 | 23000 | 90 |
| 2 - 10 STORES | 25000 | 17000 | 36000 | 310 |
| 10 + STORES | 32400 | 28000 | 36970 | 8943 |

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

## TABLE 12B
# MEDIAN SIZE IN SQUARE FEET OF A SUPERMARKET

| | MEDIAN | MIDDLE RANGE | | NUMBER PARTICIPATING |
|---|---|---|---|---|
| **ALL COMPANIES** | | | | |
| TOTAL | 31415 | 28000 | 36970 | 9670 |
| BOTTOM ALL STORE GROWTH | 28800 | 28800 | 28800 | 2147 |
| TOP ALL STORE GROWTH | 40200 | 31415 | 40200 | 1119 |
| **1 STORE OPERATORS** | | | | |
| TOTAL | 18500 | 13300 | 23000 | 90 |
| BOTTOM ALL STORE GROWTH | 18500 | 15000 | 30000 | 19 |
| TOP ALL STORE GROWTH | 19400 | 14000 | 22500 | 29 |
| **2 - 10 STORE COMPANIES** | | | | |
| TOTAL | 25000 | 17000 | 36000 | 310 |
| BOTTOM ALL STORE GROWTH | 23750 | 15000 | 33000 | 64 |
| TOP ALL STORE GROWTH | 19000 | 14000 | 55000 | 60 |
| **10 + STORE COMPANIES** | | | | |
| TOTAL | 32400 | 28000 | 36970 | 8943 |
| BOTTOM ALL STORE GROWTH | 28800 | 28800 | 28800 | 2064 |
| TOP ALL STORE GROWTH | 40200 | 35000 | 40200 | 1030 |

NOTE: STORE GROWTH BASED ON THE PERCENT CHANGE IN RETAIL SALES FOR ALL STORES IN 1987 VS. 1988.

TOP GROWTH STORES INCLUDE THE 25 PERCENT WITH THE GREATEST INCREASE. BOTTOM GROWTH STORES INCLUDE THE 25 PERCENT WITH THE SMALLEST INCREASE.

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

### TABLE 13A
## AVERAGE PRICE PER ITEM (IN DOLLARS) OF ITEMS CARRIED IN A SUPERMARKET

| | | ANNUAL SALES IN MILLIONS | | | | | | NUMBER OF STORES | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | ALL STORES | UNDER $10 | $10-30 | $31-100 | $101-250 | $251-500 | $501+ | 1 | 2-10 | 11+ |
| RESPONDING STORES | 5437 | 34 | 26 | 99 | 82 | 110 | 5086 | 32 | 120 | 5285 |
| PRICE OF ITEMS | $1.39 | $1.41 | $1.49 | $1.38 | $1.38 | $1.45 | $1.39 | $1.46 | $1.38 | $1.39 |

### TABLE 13B
## AVERAGE PRICE PER ITEM (IN DOLLARS) OF ITEMS CARRIED IN A SUPERMARKET

| | | GEOGRAPHIC REGION OF HEADQUARTERS | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | ALL STORES | NEW ENGLAND | MIDDLE ATLANTIC | EAST NORTH CENTRAL | WEST NORTH CENTRAL | SOUTH EAST | WEST SOUTH CENTRAL | MOUNTAIN | PACIFIC | CANADA |
| RESPONDING STORES | 5437 | 259 | 302 | 144 | 278 | 1689 | 208 | 1402 | 468 | 687 |
| PRICE OF ITEMS | $1.39 | $1.36 | $1.35 | $1.37 | $1.33 | $1.33 | $1.37 | $1.50 | $1.35 | $1.38 |

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

## TABLE 14A
# AVERAGE NUMBER OF ITEMS CARRIED IN A SUPERMARKET

| | ALL STORES | ANNUAL SALES IN MILLIONS: UNDER $10 | $10-30 | $31-100 | $101-250 | $251-500 | $501+ | NUMBER OF STORES: 1 | 2-10 | 11+ |
|---|---|---|---|---|---|---|---|---|---|---|
| RESPONDING STORES | 6020 | 65 | 67 | 275 | 231 | 123 | 5259 | 69 | 240 | 5711 |
| NUMBER OF ITEMS | 26430 | 15123 | 18325 | 14259 | 19504 | 23595 | 27676 | 16834 | 17982 | 26897 |

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

## TABLE 14B
# AVERAGE NUMBER OF ITEMS CARRIED IN A SUPERMARKET

| | ALL STORES | GEOGRAPHIC REGION OF HEADQUARTERS: NEW ENGLAND | MIDDLE ATLANTIC | EAST NORTH CENTRAL | WEST NORTH CENTRAL | SOUTH EAST | WEST SOUTH CENTRAL | MOUNTAIN | PACIFIC | CANADA |
|---|---|---|---|---|---|---|---|---|---|---|
| RESPONDING STORES | 6020 | 275 | 342 | 338 | 303 | 1845 | 312 | 923 | 575 | 810 |
| NUMBER OF ITEMS | 26430 | 38036 | 19955 | 17652 | 22469 | 37479 | 28420 | 25125 | 24514 | 13280 |

## TABLE 14C
# AVERAGE NUMBER OF ITEMS CARRIED IN A SUPERMARKET - TOP ALL STORE GROWTH

| | ALL STORES | ANNUAL SALES IN MILLIONS: UNDER $10 | $10-30 | $31-100 | $101-250 | $251-500 | $501+ | NUMBER OF STORES: 1 | 2-10 | 11+ |
|---|---|---|---|---|---|---|---|---|---|---|
| RESPONDING STORES | 528 | 19 | 15 | 33 | 25 | 9 | 427 | 23 | 48 | 457 |
| NUMBER OF ITEMS | 23360 | 16980 | 14559 | 21379 | | 22500 | 25021 | 17044 | 16417 | 24407 |

## TABLE 14D
# AVERAGE NUMBER OF ITEMS CARRIED IN A SUPERMARKET - TOP ALL STORE GROWTH

| | ALL STORES | GEOGRAPHIC REGION OF HEADQUARTERS: NEW ENGLAND | MIDDLE ATLANTIC | EAST NORTH CENTRAL | WEST NORTH CENTRAL | SOUTH EAST | WEST SOUTH CENTRAL | MOUNTAIN | PACIFIC | CANADA |
|---|---|---|---|---|---|---|---|---|---|---|
| RESPONDING STORES | 528 | 70 | 96 | 26 | 2 | 158 | 70 | 2 | 18 | 86 |
| NUMBER OF ITEMS | 23360 | 18693 | 12874 | 21056 | | 35515 | 21914 | | 18556 | 19779 |

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

## TABLE 15A

## PROFILE BY STORE TYPE —NUMBER OF STORES RESPONDING TO EACH ITEM

| | CONVENTIONAL STORES | SUPER STORES | COMBINATION STORES | WAREHOUSE STORES |
|---|---|---|---|---|
| MEDIAN WEEKLY SALES | 3504 | 1325 | 837 | 168 |
| MEDIAN WEEKLY SALES/CHECKOUT | 3046 | 1151 | 663 | 120 |
| MEDIAN SALE/ CUSTOMER TRANSACTION | 3353 | 1308 | 766 | 166 |
| MEDIAN SALES/LABOR HOUR | 2980 | 1126 | 738 | 166 |
| MEDIAN WEEKLY SALES/SQUARE FOOT OF SELLING AREA | 3447 | 1319 | 833 | 165 |
| MEDIAN TOTAL SIZE/SQUARE FEET | 3468 | 1331 | 836 | 166 |
| AVERAGE RETAIL PRICE/ITEM | 2811 | 1042 | 642 | 122 |
| AVERAGE NUMBER OF ITEMS CARRIED | 3032 | 1265 | 728 | 150 |

NOTE: UNWEIGHTED DATA

## TABLE 15B

## PROFILE BY STORE TYPE

| | CONVENTIONAL STORES | SUPER STORES | COMBINATION STORES | WAREHOUSE STORES |
|---|---|---|---|---|
| MEDIAN WEEKLY SALES | $144000 | $281300 | $254500 | $331300 |
| MEDIAN WEEKLY SALES/CHECKOUT | $20673 | $27306 | $27177 | $36791 |
| MEDIAN SALE/ CUSTOMER TRANSACTION | $14.15 | $18.38 | $15.93 | $25.14 |
| MEDIAN SALES/LABOR HOUR | $86.00 | $101.70 | $95.50 | $146.00 |
| MEDIAN WEEKLY SALES/SQUARE FOOT OF SELLING AREA | $8.60 | $10.80 | $9.10 | $10.25 |
| MEDIAN TOTAL SIZE/SQUARE FEET | 25525 | 39970 | 40600 | 43255 |
| AVERAGE RETAIL PRICE/ITEM | $1.34 | $1.43 | $1.49 | $1.44 |
| AVERAGE NUMBER OF ITEMS CARRIED | 25980 | 28796 | 31175 | 21595 |

NOTE: EACH COLUMN IS INDIVIDUALLY WEIGHTED BY STORE TYPE

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

## TABLE 16A
## PERCENTAGE OF STORES WITH SCANNING

| | | ANNUAL SALES IN MILLIONS | | | | | | NUMBER OF STORES | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | ALL COMPANIES | UNDER $10 | $10-30 | $31-100 | $101-250 | $251-500 | $501+ | 1 | 2-10 | 11+ |
| RESPONDING STORES | 9839 | 100 | 88 | 322 | 275 | 248 | 8806 | 92 | 324 | 9423 |
| PERCENTAGE SCANNING | 59.7% | 55.0% | 67.0% | 48.4% | 76.0% | 68.5% | 59.4% | 66.3% | 66.0% | 59.5% |

## TABLE 16B
## PERCENTAGE OF STORES WITH SCANNING

| | | GEOGRAPHIC REGION OF HEADQUARTERS | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | ALL COMPANIES | NEW ENGLAND | MIDDLE ATLANTIC | EAST NORTH CENTRAL | WEST NORTH CENTRAL | SOUTH EAST | WEST SOUTH CENTRAL | MOUNTAIN | PACIFIC | CANADA |
| RESPONDING STORES | 9839 | 357 | 1873 | 1648 | 339 | 1873 | 318 | 1468 | 595 | 1071 |
| PERCENTAGE SCANNING | 59.7% | 87.7% | 36.6% | 20.3% | 84.4% | 86.3% | 74.8% | 83.7% | 92.1% | 52.6% |

## TABLE 16C
## PERCENTAGE OF STORES WITH SCANNING - TOP ALL STORE GROWTH

| | | ANNUAL SALES IN MILLIONS | | | | | | NUMBER OF STORES | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | ALL STORES | UNDER $10 | $10-30 | $31-100 | $101-250 | $251-500 | $501+ | 1 | 2-10 | 11+ |
| RESPONDING STORES | 1130 | 24 | 18 | 50 | 25 | 28 | 985 | 29 | 71 | 1030 |
| PERCENTAGE SCANNING | 79.6% | 54.2% | 66.7% | 50.0% | 100.0% | 100.0% | 80.8% | 58.6% | 54.9% | 81.8% |

## TABLE 16D
## PERCENTAGE OF STORES WITH SCANNING - TOP ALL STORE GROWTH

| | | GEOGRAPHIC REGION OF HEADQUARTERS | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | ALL STORES | NEW ENGLAND | MIDDLE ATLANTIC | EAST NORTH CENTRAL | WEST NORTH CENTRAL | SOUTH EAST | WEST SOUTH CENTRAL | MOUNTAIN | PACIFIC | CANADA |
| RESPONDING STORES | 1130 | 149 | 98 | 34 | 2 | 179 | 70 | 486 | 22 | 90 |
| PERCENTAGE SCANNING | 79.6% | 83.2% | 37.8% | 64.7% | | 96.6% | 75.7% | 80.9% | 45.5% | 95.6% |

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

## TABLE 17A
## SPECIALTY/SERVICE DEPARTMENT OFFERED BY SUPERMARKETS

| | | ANNUAL SALES IN MILLIONS | | | | | | NUMBER OF STORES | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | ALL STORES | UNDER $10 | $10-30 | $31-100 | $101-250 | $251-500 | $501+ | 1 | 2-10 | 11+ |
| UNWEIGHTED BASE | 226 | 83 | 41 | 37 | 17 | 10 | 38 | 92 | 70 | 64 |
| TOTAL RESPONDING STORES | 7281 | 98 | 88 | 315 | 275 | 248 | 6257 | 92 | 315 | 6874 |
| BEER | 72.3% | 60.2% | 69.3% | 47.0% | 72.4% | 58.9% | 74.3% | 64.1% | 67.6% | 72.6% |
| DELI OFFERING CARRY-OUT ITEMS | 71.5 | 69.4 | 78.4 | 66.7 | 66.2 | 76.2 | 71.7 | 76.1 | 72.7 | 71.4 |
| WINE | 64.8 | 53.1 | 59.1 | 35.9 | 66.5 | 57.7 | 56.7 | 53.3 | 61.6 | 65.1 |
| SCRATCH AND/OR BAKE-OFF BAKERY | 63.1 | 58.2 | 69.3 | 62.2 | 52.4 | [illegible] | 63.4 | 58.7 | 66.7 | 63.0 |
| COURTESY BOOTH | 57.5 | 64.3 | 70.5 | 69.5 | 45.1 | [illegible] | 57.7 | 64.1 | 67.3 | 56.9 |
| FLORAL/PLANT SHOP | 53.9 | 24.5 | 52.3 | 34.3 | 38.2 | 72.6 | 55.4 | 32.6 | 43.2 | 54.7 |
| FRESH SEAFOOD | 47.4 | 48.0 | 55.7 | 36.5 | 40.4 | 72.2 | 47.1 | 53.3 | 60.3 | 46.7 |
| READING CENTER | 44.2 | 57.1 | 35.2 | 34.3 | 19.6 | 37.5 | 45.9 | 52.2 | 41.6 | 44.2 |
| VIDEO RENTAL | 35.1 | 34.7 | 63.6 | 38.7 | 32.0 | 70.6 | 33.3 | 41.3 | 43.2 | 34.7 |
| SERVICE MEAT | 32.0 | 45.9 | 36.4 | 53.7 | 21.5 | 52.4 | 30.3 | 50.0 | 43.2 | 31.3 |
| PHOTOGRAPHIC SERVICE CENTER | 31.9 | 32.7 | 58.0 | 24.1 | 34.9 | 39.1 | 31.5 | 45.7 | 37.8 | 31.5 |
| SALAD BAR | 31.1 | 21.4 | 26.1 | 23.2 | 19.6 | 29.8 | 32.3 | 30.4 | 24.8 | 31.4 |
| NUTRITIONAL SHELF TAGS | 26.1 | 14.3 | 33.0 | 33.3 | 6.9 | 12.5 | 27.2 | 18.5 | 32.1 | 25.9 |
| PHARMACY | 21.2 | 4.1 | 10.2 | 11.1 | 27.6 | 37.5 | 21.2 | 5.4 | 15.2 | 21.7 |
| LIQUOR | 21.0 | 16.3 | 23.9 | 10.5 | 16.0 | 28.2 | 21.5 | 20.7 | 17.1 | 21.2 |
| CASH DISPENSING MACHINES (ATMs) | 18.7 | 5.1 | 9.1 | 11.4 | 17.1 | 16.5 | 19.5 | 10.9 | 17.5 | 18.8 |
| COSMETIC CENTER | 17.8 | 29.6 | 11.4 | 9.5 | 13.5 | 22.2 | 18.2 | 30.4 | 16.2 | 17.7 |
| LUNCH COUNTER/SNACK BAR | 8.4 | 17.3 | 19.3 | 18.1 | 5.1 | 28.6 | 7.0 | 15.2 | 18.1 | 7.9 |
| HOME DELIVERY SERVICE | 8.0 | 29.6 | 13.6 | 20.0 | 9.1 | 4.8 | 7.0 | 29.3 | 6.7 | 7.8 |
| CATERING | 5.3 | 37.8 | 40.9 | 10.2 | 4.7 | 6.5 | 4.0 | 31.5 | 21.9 | 4.2 |
| IN-STORE BANK | 4.7 | 3.1 | 10.2 | 2.5 | 2.5 | 12.5 | 4.5 | 7.6 | 5.1 | 4.6 |
| RESTAURANT | 2.7 | 4.1 | 8.0 | 6.3 | 2.2 | 9.7 | 2.2 | 5.4 | 6.0 | 2.5 |

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

## TABLE 17B
## SPECIALTY/SERVICE DEPARTMENT OFFERED BY SUPERMARKETS

| | | GEOGRAPHIC REGION OF HEADQUARTERS | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | ALL STORES | NEW ENGLAND | MIDDLE ATLANTIC | EAST NORTH CENTRAL | WEST NORTH CENTRAL | SOUTH EAST | WEST SOUTH CENTRAL | MOUNTAIN | PACIFIC | CANADA |
| UNWEIGHTED BASE | 226 | 17 | 28 | 54 | 15 | 37 | 15 | 13 | 31 | 16 |
| TOTAL RESPONDING STORES | 7281 | 357 | 673 | 406 | 339 | 1871 | 318 | 1468 | 595 | 1254 |
| BEER | 72.3% | 32.5% | 70.9% | 77.1% | 86.4% | 83.6% | 78.3% | 75.1% | 99.3% | 44.5% |
| DELI OFFERING CARRY-OUT ITEMS | 71.5 | 94.4 | 92.7 | 68.2 | 75.8 | 81.9 | 50.6 | 69.8 | 72.6 | 44.7 |
| WINE | 64.8 | 46.8 | 45.2 | 78.1 | 51.3 | 74.0 | 68.9 | 68.0 | 99.3 | 45.0 |
| SCRATCH AND/OR BAKE-OFF BAKERY | 63.1 | 56.6 | 49.8 | 82.0 | 78.8 | 74.8 | 58.2 | 46.0 | 56.1 | 69.0 |
| COURTESY BOOTH | 57.5 | 94.1 | 96.0 | 74.4 | 85.3 | 72.7 | 50.6 | 26.4 | 16.8 | 48.0 |
| FLORAL/PLANT SHOP | 53.9 | 77.6 | 66.6 | 60.6 | 48.7 | 38.3 | 63.5 | 81.1 | 65.0 | 23.5 |
| FRESH SEAFOOD | 47.4 | 96.1 | 39.1 | 61.8 | 39.5 | 41.6 | 30.2 | 48.4 | 68.7 | 37.1 |
| READING CENTER | 44.2 | 15.4 | 47.7 | 29.6 | 56.3 | 58.5 | 43.4 | 35.3 | 26.4 | 49.5 |
| VIDEO RENTAL | 35.1 | 60.2 | 44.9 | 56.9 | 78.5 | 24.1 | 58.8 | 42.1 | 25.2 | 10.9 |
| SERVICE MEAT | 32.0 | 47.1 | 32.8 | 35.2 | 28.6 | 22.4 | 25.5 | 20.5 | 20.2 | 62.3 |
| PHOTOGRAPHIC SERVICE CENTER | 31.9 | 73.9 | 59.0 | 37.4 | 76.1 | 19.4 | 67.0 | 24.3 | 39.7 | 6.8 |
| SALAD BAR | 31.1 | 69.7 | 46.2 | 38.2 | 26.8 | 16.1 | 17.9 | 45.8 | 7.6 | 30.4 |
| NUTRITIONAL SHELF TAGS | 26.1 | 64.4 | 2.8 | 28.8 | 36.3 | 23.1 | 78.0 | 38.5 | 24.9 | 1.2 |
| PHARMACY | 21.2 | 13.7 | 11.6 | 23.6 | 34.5 | 11.2 | 41.5 | 31.3 | 32.8 | 16.5 |
| LIQUOR | 21.0 | 2.2 | 2.1 | 32.8 | 39.5 | 7.5 | 3.8 | 43.0 | 76.1 | .2 |
| CASH DISPENSING MACHINES (ATMs) | 18.7 | 27.5 | 22.7 | 11.3 | 33.0 | 14.7 | 2.5 | 36.5 | 7.2 | 7.0 |
| COSMETIC CENTER | 17.6 | 2.8 | 38.8 | 20.4 | 19.5 | 15.7 | 52.2 | 9.2 | 32.9 | 6.9 |
| LUNCH COUNTER/SNACK BAR | 8.4 | 3.1 | 6.1 | 10.1 | 2.4 | 1.5 | 45.6 | 1.8 | 23.9 | 13.6 |
| HOME DELIVERY SERVICE | 8.0 | 2.5 | 6.1 | 7.9 | 20.6 | .5 | 2.2 | .3 | .7 | 32.3 |
| CATERING | 5.3 | 1.7 | 7.3 | 10.1 | 39.8 | 1.5 | 2.2 | .5 | 2.5 | 7.9 |
| IN-STORE BANK | 4.7 | 19.0 | 13.2 | 10.6 | 2.4 | 1.0 | - | 4.6 | 7.1 | .3 |
| RESTAURANT | 2.7 | .3 | 1.3 | 2.0 | 39.8 | .6 | .6 | 1.6 | 1.3 | .1 |

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

## TABLE 17C
# SPECIALTY/SERVICE DEPARTMENT OFFERED BY SUPERMARKETS - TOP ALL STORE GROWTH

| | | ANNUAL SALES IN MILLIONS | | | | | | NUMBER OF STORES | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | ALL STORES | UNDER $10 | $10-30 | $31-100 | $101-250 | $251-500 | $501+ | 1 | 2-10 | 11+ |
| UNWEIGHTED BASE | 52 | 24 | 9 | 7 | 2 | 2 | 8 | 29 | 13 | 10 |
| TOTAL RESPONDING STORES | 1123 | 24 | 18 | 43 | | | 985 | 29 | 64 | 1030 |
| DELI OFFERING CARRY-OUT ITEMS | 79.3% | 70.8% | 100.0% | 69.8% | | | 78.4% | 72.4% | 78.1% | 79.5% |
| FLORAL/PLANT SHOP | 73.3 | 29.2 | 72.2 | 25.6 | | | 79.5 | 37.9 | 40.6 | 76.3 |
| FRESH SEAFOOD | 59.0 | 45.8 | 55.6 | 41.9 | | | 59.6 | 48.3 | 71.9 | 58.5 |
| COURTESY BOOTH | 53.0 | 58.3 | 44.4 | 58.1 | | | 54.7 | 58.6 | 51.6 | 52.9 |
| PHOTOGRAPHIC SERVICE CENTER | 52.8 | 41.7 | 66.7 | 32.6 | | | 55.6 | 44.8 | 28.1 | 54.6 |
| SERVICE MEAT | 50.0 | 50.0 | 83.3 | 27.9 | | | 52.1 | 51.7 | 57.8 | 49.4 |
| READING CENTER | 48.4 | 83.3 | 50.0 | - | | | 50.5 | 75.9 | 39.1 | 48.3 |
| SALAD BAR | 47.8 | 16.7 | 33.3 | 14.0 | | | 51.0 | 24.1 | 17.2 | 50.4 |
| SCRATCH AND/OR BAKE-OFF BAKERY | 47.6 | 58.3 | 83.3 | 41.9 | | | 44.2 | 62.1 | 60.9 | 46.3 |
| BEER | 45.9 | 50.0 | 66.7 | 48.8 | | | 44.3 | 55.2 | 70.3 | 44.1 |
| VIDEO RENTAL | 45.4 | 41.7 | 44.4 | 48.8 | | | 47.2 | 44.8 | 28.1 | 46.5 |
| WINE | 45.0 | 37.5 | 66.7 | 44.2 | | | 43.8 | 44.8 | 70.3 | 43.4 |
| PHARMACY | 37.1 | 4.2 | 16.7 | 32.6 | | | 39.0 | 6.9 | 26.6 | 38.6 |
| NUTRITIONAL SHELF TAGS | 32.7 | 20.8 | 61.1 | 2.3 | | | 35.5 | 24.1 | 21.9 | 33.6 |
| COSMETIC CENTER | 27.3 | 33.3 | 22.2 | 30.2 | | | 26.8 | 31.0 | 40.6 | 26.4 |
| LIQUOR | 22.7 | 12.5 | 55.6 | 27.9 | | | 23.4 | 17.2 | 31.3 | 22.3 |
| CASH DISPENSING MACHINES (ATMs) | 19.8 | 12.5 | 5.6 | 20.9 | | | 20.8 | 13.8 | 20.3 | 19.9 |
| LUNCH COUNTER/SNACK BAR | 7.7 | 20.8 | 16.7 | 7.0 | | | 6.7 | 20.7 | 26.6 | 6.2 |
| IN-STORE BANK | 6.8 | 8.3 | 22.2 | - | | | 6.9 | 13.8 | 6.3 | 6.6 |
| CATERING | 2.6 | 29.2 | 83.3 | 9.3 | | | .3 | 27.6 | 25.0 | .5 |
| HOME DELIVERY SERVICE | 1.3 | 29.2 | 22.2 | 4.7 | | | .2 | 27.6 | 7.8 | .2 |
| RESTAURANT | .8 | 12.5 | 11.1 | 4.7 | | | .2 | 13.8 | 3.1 | .3 |

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

## TABLE 17D

# SPECIALTY/SERVICE DEPARTMENT OFFERED BY SUPERMARKETS - TOP ALL STORE GROWTH

| | | GEOGRAPHIC REGION OF HEADQUARTERS | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | ALL STORES | NEW ENGLAND | MIDDLE ATLANTIC | EAST NORTH CENTRAL | WEST NORTH CENTRAL | SOUTH EAST | WEST SOUTH CENTRAL | MOUNTAIN | PACIFIC | CANADA |
| UNWEIGHTED BASE | 52 | 7 | 6 | 9 | 2 | 9 | 2 | 4 | 8 | 5 |
| TOTAL RESPONDING STORES | 1123 | 149 | 98 | 27 | | 179 | | 486 | 22 | 90 |
| DELI OFFERING CARRY-OUT ITEMS | 79.3% | 89.9% | 89.8% | 92.6% | | 92.7% | | 78.8% | 50.0% | 32.2% |
| FLORAL/PLANT SHOP | 73.3 | 70.5 | 4.1 | 48.1 | | 77.1 | | 99.0 | 31.8 | 6.7 |
| FRESH SEAFOOD | 59.0 | 99.3 | 17.3 | 18.5 | | 96.6 | | 39.9 | 54.5 | 81.1 |
| COURTESY BOOTH | 53.0 | 95.3 | 96.9 | 59.3 | | 6.7 | | 50.8 | 27.3 | 6.7 |
| PHOTOGRAPHIC SERVICE CENTER | 52.8 | 48.3 | 2.0 | 81.5 | | 86.6 | | 53.5 | 18.2 | 7.8 |
| SERVICE MEAT | 50.0 | 51.7 | 6.1 | 33.3 | | 86.6 | | 40.1 | 54.5 | 72.2 |
| READING CENTER | 48.4 | .7 | 3.1 | 37.0 | | 7.8 | | 99.8 | 13.6 | 27.8 |
| SALAD BAR | 47.8 | 82.6 | 3.1 | 7.4 | | 91.6 | | 44.2 | 9.1 | 2.2 |
| SCRATCH AND/OR BAKE-OFF BAKERY | 47.6 | 84.6 | 58.2 | 81.5 | | 76.5 | | 13.0 | 22.7 | 78.9 |
| BEER | 45.9 | 29.5 | 95.9 | 48.1 | | 35.2 | | 45.9 | 86.4 | 30.0 |
| VIDEO RENTAL | 45.4 | 61.1 | 13.3 | 81.5 | | 4.5 | | 64.4 | 36.4 | 15.6 |
| WINE | 45.0 | 72.5 | 27.6 | 37.0 | | 35.2 | | 45.9 | 86.4 | 30.0 |
| PHARMACY | 37.1 | 10.7 | 2.0 | 51.9 | | 57.0 | | 42.6 | - | 37.8 |
| NUTRITIONAL SHELF TAGS | 32.7 | 89.3 | - | 25.9 | | 81.6 | | - | 27.3 | 4.4 |
| COSMETIC CENTER | 27.3 | 3.4 | 1.0 | 44.4 | | 59.2 | | 23.7 | 22.7 | 24.4 |
| LIQUOR | 22.7 | 5.4 | - | 33.3 | | - | | 45.9 | 59.1 | 2.2 |
| CASH DISPENSING MACHINES (ATMs) | 19.8 | 14.1 | 19.4 | 7.4 | | 81.0 | | - | 13.6 | 34.4 |
| LUNCH COUNTER/SNACK BAR | 7.7 | 3.4 | 1.0 | 11.1 | | 5.6 | | - | 9.1 | 14.4 |
| IN-STORE BANK | 6.8 | 45.6 | 2.0 | 11.1 | | 1.7 | | - | - | - |
| CATERING | 2.6 | 2.7 | 2.0 | 37.0 | | 1.1 | | .2 | 22.7 | 2.2 |
| HOME DELIVERY SERVICE | 1.3 | 3.4 | 1.0 | 3.7 | | .6 | | .4 | - | - |
| RESTAURANT | .8 | .7 | 3.1 | 11.1 | | .6 | | - | - | - |

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

## TABLE 18A
# PERCENTAGE OF SALES ACCOUNTED FOR BY GENERAL MERCHANDISE (EXCLUDING HEALTH AND BEAUTY AIDS)

| | MEDIAN | MIDDLE RANGE | | NUMBER PARTICIPATING |
|---|---|---|---|---|
| ALL COMPANIES | 3.8% | 3.0% | 7.1% | 85 |
| COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS) | | | | |
| UNDER 10 MILLION | 1.8 | 1.3 | 3.4 | 23 |
| 10 - 30 MILLION | 3.5 | 1.9 | 5.0 | 22 |
| 31 - 100 MILLION | 3.6 | 2.2 | 6.8 | 15 |
| 101 - 250 MILLION | 2.1 | 1.0 | 2.9 | 5 |
| 251 - 500 MILLION | 3.7 | 3.5 | 4.5 | 5 |
| OVER 500 MILLION | 3.9 | 3.0 | 7.1 | 15 |
| GEOGRAPHIC REGION OF HEADQUARTERS | | | | |
| NEW ENGLAND | 4.1 | 3.0 | 4.1 | 8 |
| MID ATLANTIC | 2.4 | 2.4 | 2.4 | 10 |
| EAST NORTH CENTRAL | 4.5 | 2.2 | 4.5 | 22 |
| WEST NORTH CENTRAL | 4.5 | 4.5 | 4.5 | 5 |
| SOUTHEAST | 3.1 | 3.0 | 3.1 | 12 |
| WEST SOUTH CENTRAL | 6.2 | 6.2 | 15.2 | 9 |
| MOUNTAIN | | | | 2 |
| PACIFIC | 3.9 | 3.9 | 3.9 | 10 |
| CANADA | 2.4 | 2.2 | 2.6 | 7 |
| NUMBER OF STORES | | | | |
| 1 STORE | 3.0 | 1.6 | 5.0 | 30 |
| 2 - 10 STORES | 3.5 | 1.5 | 3.6 | 29 |
| 10 + STORES | 3.9 | 3.0 | 7.1 | 26 |

NOTE: DATA WEIGHTED BY 1988 SALES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

## TABLE 18B

# PERCENTAGE OF SALES ACCOUNTED FOR BY GENERAL MERCHANDISE (EXCLUDING HEALTH AND BEAUTY AIDS)

| | MEDIAN | MIDDLE RANGE | | NUMBER PARTICIPATING |
|---|---|---|---|---|
| **ALL COMPANIES** | | | | |
| TOTAL | 3.8% | 3.0% | 7.1% | 85 |
| BOTTOM ALL STORE GROWTH | 3.1 | 3.0 | 3.1 | 18 |
| TOP ALL STORE GROWTH | 3.0 | 2.6 | 5.1 | 16 |
| **1 STORE OPERATORS** | | | | |
| TOTAL | 3.0 | 1.6 | 5.0 | 30 |
| BOTTOM ALL STORE GROWTH | 3.0 | 1.5 | 3.0 | 7 |
| TOP ALL STORE GROWTH | 3.4 | 1.6 | 4.3 | 7 |
| **2 - 10 STORE COMPANIES** | | | | |
| TOTAL | 3.5 | 1.5 | 3.6 | 29 |
| BOTTOM ALL STORE GROWTH | 2.3 | 2.2 | 3.6 | 5 |
| TOP ALL STORE GROWTH | 3.5 | 3.5 | 3.5 | 4 |
| **10 + STORE COMPANIES** | | | | |
| TOTAL | 3.9 | 3.0 | 7.1 | 26 |
| BOTTOM ALL STORE GROWTH | 3.1 | 3.0 | 3.1 | 6 |
| TOP ALL STORE GROWTH | 3.0 | 2.6 | 5.1 | 5 |

NOTE: STORE GROWTH BASED ON THE PERCENT CHANGE IN RETAIL SALES FOR ALL STORES IN 1987 VS. 1988.

TOP GROWTH STORES INCLUDE THE 25 PERCENT WITH THE GREATEST INCREASE. BOTTOM GROWTH STORES INCLUDE THE 25 PERCENT WITH THE SMALLEST INCREASE.

NOTE: DATA WEIGHTED BY 1987 SALES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

## TABLE 19A

# PERCENTAGE OF SALES ACCOUNTED FOR BY HEALTH AND BEAUTY AIDS

| | MEDIAN | MIDDLE RANGE | | NUMBER PARTICIPATING |
|---|---|---|---|---|
| ALL COMPANIES | 4.5% | 3.3% | 5.0% | 84 |
| COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS) | | | | |
| UNDER 10 MILLION | 2.5 | 1.8 | 3.0 | 24 |
| 10 - 30 MILLION | 3.1 | 2.8 | 4.0 | 21 |
| 31 - 100 | 3.0 | 2.3 | 4.2 | 15 |
| 101 - 250 | 2.8 | 2.5 | 3.4 | 5 |
| 251 - 500 | 3.7 | 2.0 | 4.0 | 5 |
| OVER 500 | 5.0 | 3.3 | 5.2 | 14 |
| GEOGRAPHIC REGION OF HEADQUARTERS | | | | |
| NEW ENGLAND | 5.2 | 2.0 | 5.2 | 8 |
| MID ATLANTIC | 4.5 | 4.5 | 4.5 | 10 |
| EAST NORTH CENTRAL | 2.1 | 1.3 | 2.9 | 22 |
| WEST NORTH CENTRAL | 2.5 | 2.5 | 2.5 | 5 |
| SOUTHEAST | 3.3 | 3.3 | 3.8 | 12 |
| WEST SOUTH CENTRAL | 9.9 | 9.9 | 9.9 | 8 |
| MOUNTAIN | | | | 2 |
| PACIFIC | 5.4 | 5.4 | 5.4 | 9 |
| CANADA | 2.2 | 1.6 | 2.6 | 8 |
| NUMBER OF STORES | | | | |
| 1 STORE | 3.0 | 2.1 | 4.0 | 30 |
| 2 - 10 STORES | 3.4 | 2.3 | 4.0 | 29 |
| 10 + STORES | 5.0 | 3.3 | 5.2 | 24 |

NOTE: DATA WEIGHTED BY 1988 SALES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

## TABLE 19B

# PERCENTAGE OF SALES ACCOUNTED FOR BY HEALTH AND BEAUTY AIDS

| | MEDIAN | MIDDLE RANGE | | NUMBER PARTICIPATING |
|---|---|---|---|---|
| **ALL COMPANIES** | | | | |
| TOTAL | 4.5% | 3.3% | 5.0% | 84 |
| BOTTOM ALL STORE GROWTH | 3.3 | 3.3 | 3.3 | 17 |
| TOP ALL STORE GROWTH | 7.0 | 4.0 | 9.0 | 15 |
| **1 STORE OPERATORS** | | | | |
| TOTAL | 3.0 | 2.1 | 4.0 | 30 |
| BOTTOM ALL STORE GROWTH | 4.0 | 2.9 | 4.0 | 7 |
| TOP ALL STORE GROWTH | 2.5 | 2.1 | 3.0 | 7 |
| **2 - 10 STORE COMPANIES** | | | | |
| TOTAL | 3.4 | 2.3 | 4.0 | 29 |
| BOTTOM ALL STORE GROWTH | 2.6 | 2.6 | 3.4 | 5 |
| TOP ALL STORE GROWTH | 4.0 | 4.0 | 4.0 | 4 |
| **10 + STORE COMPANIES** | | | | |
| TOTAL | 5.0 | 3.3 | 5.2 | 24 |
| BOTTOM ALL STORE GROWTH | 3.3 | 3.3 | 3.3 | 5 |
| TOP ALL STORE GROWTH | 9.0 | 2.0 | 9.0 | 4 |

NOTE: STORE GROWTH BASED ON THE PERCENT CHANGE IN RETAIL SALES FOR ALL STORES IN 1987 VS. 1988.

TOP GROWTH STORES INCLUDE THE 25 PERCENT WITH THE GREATEST INCREASE. BOTTOM GROWTH STORES INCLUDE THE 25 PERCENT WITH THE SMALLEST INCREASE.

NOTE: DATA WEIGHTED BY 1987 SALES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

## TABLE 20A
## PERCENTAGE OF SALES ACCOUNTED FOR BY GM/HaBA COMBINED

| | MEDIAN | MIDDLE RANGE | | NUMBER PARTICIPATING |
|---|---|---|---|---|
| ALL COMPANIES | 5.5% | 2.0% | 9.3% | 155 |
| COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS) | | | | |
| UNDER 10 MILLION | 4.5 | 3.1 | 6.2 | 53 |
| 10 - 30 MILLION | 6.4 | 4.7 | 7.6 | 27 |
| 31 - 100 | 4.3 | 3.4 | 8.8 | 29 |
| 101 - 250 | 6.8 | 5.0 | 7.2 | 12 |
| 251 - 500 | 7.5 | 7.4 | 9.1 | 7 |
| OVER 500 | 5.0 | 2.0 | 9.3 | 27 |
| GEOGRAPHIC REGION OF HEADQUARTERS | | | | |
| NEW ENGLAND | 5.0 | 5.0 | 6.7 | 9 |
| MID ATLANTIC | 9.3 | 7.4 | 9.6 | 17 |
| EAST NORTH CENTRAL | 8.8 | 7.0 | 8.8 | 40 |
| WEST NORTH CENTRAL | 8.5 | 7.0 | 8.8 | 13 |
| SOUTHEAST | 2.0 | 2.0 | 2.0 | 27 |
| WEST SOUTH CENTRAL | 16.1 | 16.1 | 16.1 | 9 |
| MOUNTAIN | 12.1 | 12.1 | 12.1 | 9 |
| PACIFIC | 9.3 | 9.3 | 11.7 | 21 |
| CANADA | 9.2 | 5.1 | 16.0 | 10 |
| NUMBER OF STORES | | | | |
| 1 STORE | 4.6 | 3.1 | 7.0 | 60 |
| 2 - 10 STORES | 6.9 | 4.7 | 7.5 | 48 |
| 10 + STORES | 5.1 | 2.0 | 9.3 | 47 |

NOTE: DATA WEIGHTED BY 1988 SALES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

## TABLE 20B
## PERCENTAGE OF SALES ACCOUNTED FOR BY GM/HaBA COMBINED

| | MEDIAN | MIDDLE RANGE | | NUMBER PARTICIPATING |
|---|---|---|---|---|
| **ALL COMPANIES** | | | | |
| TOTAL | 5.5% | 2.0% | 9.3% | 155 |
| BOTTOM ALL STORE GROWTH | 2.0 | 2.0 | 5.0 | 39 |
| TOP ALL STORE GROWTH | 9.2 | 5.0 | 11.6 | 35 |
| **1 STORE OPERATORS** | | | | |
| TOTAL | 4.6 | 3.1 | 7.0 | 60 |
| BOTTOM ALL STORE GROWTH | 4.6 | 3.5 | 6.0 | 10 |
| TOP ALL STORE GROWTH | 4.0 | 3.2 | 6.4 | 21 |
| **2 - 10 STORE COMPANIES** | | | | |
| TOTAL | 6.9 | 4.7 | 7.5 | 48 |
| BOTTOM ALL STORE GROWTH | 6.9 | 4.3 | 7.1 | 13 |
| TOP ALL STORE GROWTH | 7.5 | 5.2 | 7.5 | 10 |
| **10 + STORE COMPANIES** | | | | |
| TOTAL | 5.1 | 2.0 | 9.3 | 47 |
| BOTTOM ALL STORE GROWTH | 2.0 | 2.0 | 4.8 | 16 |
| TOP ALL STORE GROWTH | 11.6 | 8.3 | 11.6 | 4 |

NOTE: STORE GROWTH BASED ON THE PERCENT CHANGE IN RETAIL SALES FOR ALL STORES IN 1987 VS. 1988.

TOP GROWTH STORES INCLUDE THE 25 PERCENT WITH THE GREATEST INCREASE. BOTTOM GROWTH STORES INCLUDE THE 25 PERCENT WITH THE SMALLEST INCREASE.

NOTE: DATA WEIGHTED BY 1988 SALES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

## TABLE 21A
# PERCENTAGE OF SALES ACCOUNTED FOR BY TOBACCO

| | MEDIAN | MIDDLE RANGE | | NUMBER PARTICIPATING |
|---|---|---|---|---|
| ALL COMPANIES | 3.0% | 2.0% | 3.0% | 149 |
| COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS) | | | | |
| UNDER 10 MILLION | 4.5 | 2.0 | 5.6 | 56 |
| 10 - 30 MILLION | 3.0 | 1.4 | 4.8 | 26 |
| 31 - 100 MILLION | 3.0 | 1.2 | 4.0 | 28 |
| 101 - 250 MILLION | 3.3 | 2.0 | 4.0 | 10 |
| 251 - 500 MILLION | 2.5 | 2.0 | 3.5 | 6 |
| OVER 500 MILLION | 2.8 | 2.0 | 3.0 | 23 |
| GEOGRAPHIC REGION OF HEADQUARTERS | | | | |
| NEW ENGLAND | 1.0 | .2 | 1.0 | 13 |
| MID ATLANTIC | 2.7 | 2.7 | 2.7 | 16 |
| EAST NORTH CENTRAL | 3.5 | 2.5 | 3.8 | 33 |
| WEST NORTH CENTRAL | 2.5 | 2.5 | 3.4 | 12 |
| SOUTHEAST | 3.0 | 3.0 | 3.0 | 27 |
| WEST SOUTH CENTRAL | 1.5 | 1.5 | 1.5 | 11 |
| MOUNTAIN | 1.8 | 1.8 | 1.8 | 6 |
| PACIFIC | 2.0 | 1.0 | 2.3 | 17 |
| CANADA | 5.3 | 4.4 | 6.0 | 14 |
| NUMBER OF STORES | | | | |
| 1 STORE | 3.0 | 1.7 | 5.3 | 63 |
| 2 - 10 STORES | 2.8 | 1.4 | 3.5 | 44 |
| 10 + STORES | 3.0 | 2.0 | 3.0 | 41 |

NOTE: DATA WEIGHTED BY 1988 SALES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

## TABLE 21B
## PERCENTAGE OF SALES ACCOUNTED FOR BY TOBACCO

| | MEDIAN | MIDDLE RANGE | | NUMBER PARTICIPATING |
|---|---|---|---|---|
| ALL COMPANIES | | | | |
| TOTAL | 3.0% | 2.0% | 3.0% | 149 |
| BOTTOM ALL STORE GROWTH | 3.0 | 3.0 | 3.0 | 35 |
| TOP ALL STORE GROWTH | 1.9 | 1.0 | 1.9 | 35 |
| 1 STORE OPERATORS | | | | |
| TOTAL | 3.0 | 1.7 | 5.3 | 63 |
| BOTTOM ALL STORE GROWTH | 3.0 | 1.7 | 3.3 | 12 |
| TOP ALL STORE GROWTH | 5.0 | 2.0 | 6.0 | 20 |
| 2 - 10 STORE COMPANIES | | | | |
| TOTAL | 2.8 | 1.4 | 3.5 | 44 |
| BOTTOM ALL STORE GROWTH | 3.2 | 2.6 | 6.0 | 11 |
| TOP ALL STORE GROWTH | 2.8 | 2.8 | 3.3 | 11 |
| 10 + STORE COMPANIES | | | | |
| TOTAL | 3.0 | 2.0 | 3.0 | 41 |
| BOTTOM ALL STORE GROWTH | 3.0 | 3.0 | 3.0 | 12 |
| TOP ALL STORE GROWTH | 1.9 | 1.0 | 1.9 | 4 |

NOTE: STORE GROWTH BASED ON THE PERCENT CHANGE IN RETAIL SALES FOR ALL STORES IN 1987 VS. 1988.

TOP GROWTH STORES INCLUDE THE 25 PERCENT WITH THE GREATEST INCREASE. BOTTOM GROWTH STORES INCLUDE THE 25 PERCENT WITH THE SMALLEST INCREASE.

NOTE: DATA WEIGHTED BY 1988 SALES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

## TABLE 22A
# PERCENTAGE OF SUPERMARKETS ACCEPTING CREDIT CARDS AND DIRECT DEBIT CARDS

| | | ANNUAL SALES IN MILLIONS | | | | | | NUMBER OF STORES | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | ALL STORES | UNDER $10 | $10-30 | $31-100 | $101-250 | $251-500 | $501+ | 1 | 2-10 | 11+ |
| RESPONDING STORES | 9839 | 100 | 88 | 322 | 275 | 248 | 8806 | 92 | 324 | 9423 |
| PERCENTAGE ACCEPTING CREDIT CARDS FOR GROCERY ITEMS | 5.2% | 17.0% | 12.5% | 6.5% | 8.7% | .4% | 5.0% | 16.3% | 9.3% | 4.9% |
| PERCENTAGE ACCEPTING CREDIT CARDS FOR PHARMACEUTICAL ITEMS AND/OR NON-FOODS | 20.1 | 14.0 | 13.6 | 10.6 | 20.7 | 44.0 | 19.9 | 17.4 | 12.3 | 20.4 |
| PERCENTAGE OF STORES ACCEPTING DIRECT DEBIT CARDS | 2.3 | 5.0 | 10.2 | 3.1 | 14.5 | - | 1.8 | 5.4 | 10.5 | 2.0 |

## TABLE 22B
# PERCENTAGE OF SUPERMARKETS ACCEPTING CREDIT CARDS AND DIRECT DEBIT CARDS

| | | GEOGRAPHIC REGION OF HEADQUARTERS | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | ALL STORES | NEW ENGLAND | MIDDLE ATLANTIC | EAST NORTH CENTRAL | WEST NORTH CENTRAL | SOUTH EAST | WEST SOUTH CENTRAL | MOUNTAIN | PACIFIC | CANADA |
| RESPONDING STORES | 9839 | 357 | 1873 | 1648 | 339 | 1873 | 318 | 1468 | 595 | 1071 |
| PERCENTAGE ACCEPTING CREDIT CARDS FOR GROCERY ITEMS | 5.2% | 3.4% | 7.4% | 11.0% | 1.8% | 1.9% | 28.3% | .3% | 4.5% | 1.2% |
| PERCENTAGE ACCEPTING CREDIT CARDS FOR PHARMACEUTICAL ITEMS AND/OR NON-FOODS | 20.1 | 26.1 | 5.2 | 12.5 | 31.3 | 11.0 | 35.2 | 45.7 | 49.2 | 18.0 |
| PERCENTAGE OF STORES ACCEPTING DIRECT DEBIT CARDS | 2.3 | .6 | .6 | 1.5 | 9.7 | .1 | - | - | 5.7 | 5.9 |

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

## TABLE 23
# MEDIAN PERCENTAGE OF ANNUAL SALES SPENT ON ADVERTISING

| | MEDIAN | MIDDLE RANGE | | NUMBER PARTICIPATING |
|---|---|---|---|---|
| ALL COMPANIES | 1.1% | .9% | 1.5% | 205 |
| COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS) | | | | |
| UNDER 10 | 1.1 | .9 | 1.6 | 79 |
| 10 - 30 | 1.2 | 1.0 | 1.5 | 34 |
| 31 - 100 | 1.0 | .9 | 1.4 | 32 |
| 101 - 250 | 1.0 | .8 | 1.2 | 15 |
| 251 - 500 | 1.0 | .7 | 1.1 | 10 |
| OVER 500 | 1.0 | .9 | 1.2 | 35 |
| GEOGRAPHIC REGION OF HEADQUARTERS | | | | |
| NEW ENGLAND | .9 | .8 | 1.0 | 16 |
| MID ATLANTIC | 1.3 | 1.0 | 1.9 | 23 |
| EAST NORTH CENTRAL | 1.2 | 1.0 | 1.6 | 47 |
| WEST NORTH CENTRAL | .9 | .5 | 1.1 | 14 |
| SOUTHEAST | 1.1 | .9 | 1.5 | 38 |
| WEST SOUTH CENTRAL | 1.1 | 1.0 | 1.3 | 13 |
| MOUNTAIN | 1.1 | .8 | 1.3 | 12 |
| PACIFIC | 1.0 | .8 | 1.5 | 27 |
| CANADA | 1.0 | 1.0 | 1.9 | 15 |
| NUMBER OF STORES | | | | |
| 1 STORE | 1.2 | 1.0 | 1.5 | 84 |
| 2 - 10 STORES | 1.0 | .9 | 1.5 | 62 |
| 10 + STORES | 1.0 | .9 | 1.2 | 59 |

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

## TABLE 24
# PERCENTAGE OF ADVERTISING DOLLARS SPENT ON FOLLOWING METHODS

| | ALL COMPANIES | ANNUAL SALES IN MILLIONS | | | | | | NUMBER OF STORES | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | | UNDER $10 | $10-30 | $31-100 | $101-250 | $251-500 | $501+ | 1 | 2-10 | 11+ |
| TOTAL | 205 | 79 | 34 | 32 | 15 | 10 | 35 | 84 | 62 | 59 |
| NEWSPAPER | 47.8% | 54.5% | 41.4% | 50.3% | 31.7% | 53.1% | 43.2% | 55.4% | 39.4% | 46.1% |
| TARGETED MAILER/FLYER | 32.3 | 33.8 | 40.6 | 27.5 | 45.0 | 10.4 | 26.7 | 31.8 | 39.6 | 25.7 |
| TELEVISION | 7.0 | 2.4 | 3.8 | 7.8 | 11.5 | 15.8 | 14.0 | 2.8 | 6.9 | 12.6 |
| RADIO | 6.4 | 6.0 | 4.6 | 7.2 | 7.9 | 8.3 | 6.9 | 6.0 | 6.5 | 6.9 |
| IN-STORE COUPONS | 5.6 | 3.2 | 7.7 | 6.8 | 1.7 | 10.8 | 7.8 | 3.4 | 6.6 | 7.3 |
| BILLBOARDS | .9 | .1 | 2.0 | .5 | 2.2 | 1.6 | 1.4 | .6 | 1.0 | 1.3 |

## TABLE 25
# PERCENTAGE OF ADVERTISING DOLLARS SPENT ON FOLLOWING METHODS

| | ALL COMPANIES | GEOGRAPHIC REGION OF HEADQUARTERS | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | | NEW ENGLAND | MIDDLE ATLANTIC | EAST NORTH CENTRAL | WEST NORTH CENTRAL | SOUTH EAST | WEST SOUTH CENTRAL | MOUNTAIN | PACIFIC | CANADA |
| TOTAL | 205 | 16 | 23 | 47 | 14 | 38 | 13 | 12 | 27 | 16 |
| NEWSPAPER | 47.8% | 44.9% | 36.3% | 52.7% | 64.5% | 38.4% | 50.2% | 60.1% | 59.6% | 48.1% |
| TARGETED MAILER/FLYER | 32.3 | 40.9 | 39.9 | 27.6 | 7.5 | 40.6 | 36.3 | 14.8 | 24.1 | 30.1 |
| TELEVISION | 7.0 | 4.4 | 5.7 | 7.9 | 4.0 | 7.2 | 7.4 | 11.8 | 6.6 | 8.5 |
| RADIO | 6.4 | 5.3 | 3.5 | 7.0 | 7.7 | 6.6 | 4.7 | 9.2 | 6.7 | 6.5 |
| IN-STORE COUPONS | 5.6 | 3.5 | 13.7 | 3.8 | 14.5 | 6.5 | .1 | 3.5 | 1.9 | 5.8 |
| BILLBOARDS | .9 | .9 | .9 | 1.0 | 1.8 | .4 | 1.4 | .6 | 1.1 | 1.0 |

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

## TABLE 26A
## PLASTIC AND/OR PAPER BAGS

| | | ANNUAL SALES IN MILLIONS | | | | | | NUMBER OF STORES | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | ALL STORES | UNDER $10 | $10-30 | $31-100 | $101-250 | $251-500 | $501+ | 1 | 2-10 | 11+ |
| RESPONDING STORES | 8288 | 100 | 85 | 318 | 275 | 248 | 7262 | 92 | 317 | 7879 |
| PERCENTAGE OF STORES OFFERING A CHOICE OF PAPER OR PLASTIC | 89.3% | 73.0% | 67.1% | 90.6% | 78.2% | 51.6% | 91.4% | 77.2% | 82.6% | 89.7% |
| PERCENTAGE OF STORES OFFERING PLASTIC BAGS EXCLUSIVELY | 4.5 | 1.0 | - | 4.4 | - | .4 | 4.9 | 1.1 | 1.6 | 4.6 |
| PERCENTAGE OF STORES OFFERING PAPER BAGS EXCLUSIVELY | 6.3 | 26.0 | 32.9 | 5.0 | 21.8 | 48.0 | 3.7 | 21.7 | 15.8 | 5.7 |

## TABLE 26B
## PLASTIC AND/OR PAPER BAGS

| | | GEOGRAPHIC REGION OF HEADQUARTERS | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | ALL STORES | NEW ENGLAND | MIDDLE ATLANTIC | EAST NORTH CENTRAL | WEST NORTH CENTRAL | SOUTH EAST | WEST SOUTH CENTRAL | MOUNTAIN | PACIFIC | CANADA |
| RESPONDING STORES | 8288 | 357 | 1872 | 413 | 339 | 1873 | 318 | 1468 | 592 | 1056 |
| PERCENTAGE OF STORES OFFERING A CHOICE OF PAPER OR PLASTIC | 89.3% | 99.7% | 93.6% | 62.5% | 71.4% | 98.9% | 89.3% | 93.1% | 86.8% | 73.2% |
| PERCENTAGE OF STORES OFFERING PLASTIC BAGS EXCLUSIVELY | 4.5 | - | 5.3 | - | - | .1 | - | - | .2 | 25.5 |
| PERCENTAGE OF STORES OFFERING PAPER BAGS EXCLUSIVELY | 6.3 | .3 | 1.0 | 37.5 | 28.6 | 1.1 | 10.7 | 6.9 | 13.0 | 1.3 |

## TABLE 27A
## PERCENTAGE OF STORES RECYCLING WASTE

| | | ANNUAL SALES IN MILLIONS | | | | | | NUMBER OF STORES | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | ALL COMPANIES | UNDER $10 | $10-30 | $31-100 | $101-250 | $251-500 | $501+ | 1 | 2-10 | 11+ |
| RESPONDING STORES | 9839 | 100 | 88 | 322 | 275 | 248 | 8806 | 92 | 324 | 9423 |
| PERCENTAGE RECYCLING | 75.4% | 60.0% | 90.9% | 86.0% | 86.9% | 96.4% | 74.1% | 58.7% | 91.0% | 75.0% |

## TABLE 27B
## PERCENTAGE OF STORES RECYCLING WASTE

| | | GEOGRAPHIC REGION OF HEADQUARTERS | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | ALL COMPANIES | NEW ENGLAND | MIDDLE ATLANTIC | EAST NORTH CENTRAL | WEST NORTH CENTRAL | SOUTH EAST | WEST SOUTH CENTRAL | MOUNTAIN | PACIFIC | CANADA |
| RESPONDING STORES | 9839 | 357 | 1873 | 1648 | 339 | 1873 | 318 | 1468 | 595 | 1071 |
| PERCENTAGE RECYCLING | 75.4% | 75.6% | 99.7% | 22.1% | 61.7% | 99.2% | 77.7% | 99.7% | 98.3% | 51.5% |

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

## TABLE 28A
## PERCENTAGE OF STORES RECYCLING THE FOLLOWING ITEMS

| | ALL COMPANIES | ANNUAL SALES IN MILLIONS | | | | | | NUMBER OF STORES | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | | UNDER $10 | $10-30 | $31-100 | $101-250 | $251-500 | $501+ | 1 | 2-10 | 11+ |
| TOTAL STORES RECYCLING WASTE | 7417 | 60 | 80 | 277 | 239 | 239 | 6522 | 54 | 295 | 7068 |
| CARDBOARD | 99.6% | 86.7% | 92.5% | 98.2% | 97.1% | 100.0% | 100% | 87.0% | 93.6% | 100% |
| MEAT TRIMMINGS | 85.8 | 93.3 | 80.0 | 87.4 | 87.9 | 88.3 | 85.6 | 92.6 | 80.3 | 86.0 |
| OTHER | | | | | | | | | | |
| BOTTLES/GLASS | 4.1 | 3.3 | 11.3 | 27.8 | 5.4 | 11.7 | 2.7 | 1.9 | 5.8 | 4.0 |
| GREASE/COOKING OIL | .4 | 6.7 | - | 1.8 | - | 9.6 | - | 5.6 | 2.0 | .3 |
| ALUMINUM CANS | 18.1 | 6.7 | 11.3 | 2.5 | 13.8 | - | 19.8 | 5.6 | 7.5 | 18.6 |
| NEWSPAPER/PAPER | 3.0 | - | - | 2.5 | 5.4 | - | 3.1 | - | 2.4 | 3.0 |
| METAL | .4 | - | - | - | - | 11.7 | - | - | - | .4 |
| PLASTIC | .4 | - | 2.5 | - | - | - | .4 | - | .7 | .3 |
| PRODUCE TRIMS | - | - | 1.3 | - | - | - | - | 1.9 | - | - |

## TABLE 28B
## PERCENTAGE OF STORES RECYCLING THE FOLLOWING ITEMS

| | ALL COMPANIES | GEOGRAPHIC REGION OF HEADQUARTERS | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | | NEW ENGLAND | MIDDLE ATLANTIC | EAST NORTH CENTRAL | WEST NORTH CENTRAL | SOUTH EAST | WEST SOUTH CENTRAL | MOUNTAIN | PACIFIC | CANADA |
| TOTAL STORES RECYCLING WASTE | 7417 | 270 | 1867 | 365 | 209 | 1858 | 247 | 1464 | 585 | 552 |
| CARDBOARD | 99.6% | 97.0% | 100.0% | 99.5% | 99.0% | 99.8% | 98.8% | 99.9% | 98.8% | 100.0% |
| MEAT TRIMMINGS | 85.8 | 57.8 | 98.3 | 96.4 | 56.5 | 99.5 | 91.5 | 66.2 | 97.3 | 52.7 |
| OTHER | | | | | | | | | | |
| BOTTLES/GLASS | 4.1 | - | 11.9 | 1.1 | - | - | - | - | 1.2 | 12.7 |
| GREASE/COOKING OIL | .4 | - | - | 1.4 | .5 | .1 | .4 | 1.6 | - | - |
| ALUMINUM CANS | 18.1 | - | 7.3 | 2.5 | 36.8 | - | 61.1 | 61.1 | 1.2 | 12.3 |
| NEWSPAPER/PAPER | 3.0 | - | 1.1 | - | - | 7.8 | - | - | 9.2 | - |
| METAL | .4 | - | 1.5 | - | - | - | - | - | - | - |
| PLASTIC | .4 | - | 1.3 | - | - | - | - | - | .3 | - |
| PRODUCE TRIMS | - | .4 | - | - | - | - | - | - | - | - |

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

## TABLE 29
## TYPICAL WASTE DISPOSAL FEE PER TON IN DECEMBER 1987

|  | MEDIAN | MIDDLE RANGE |  | NUMBER PARTICIPATING |
|---|---|---|---|---|
| ALL COMPANIES | $32.00 | $15.25 | $69.50 | 48 |
| COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS) |  |  |  |  |
| UNDER 10 MILLION | 30.00 | 0 | 100.00 | 14 |
| 10 - 30 MILLION | 23.00 | 0 | 32.00 | 11 |
| 31 - 100 | 47.00 | 21.60 | 60.00 | 7 |
| 101 - 250 |  |  |  | 3 |
| 251 - 500 |  |  |  | 1 |
| OVER 500 | 41.15 | 17.75 | 54.50 | 12 |
| GEOGRAPHIC REGION OF STORES |  |  |  |  |
| NORTHEAST | 82.50 | 54.50 | 86.00 | 8 |
| MID ATLANTIC | 33.50 | 21.50 | 54.50 | 8 |
| EAST NORTH CENTRAL | 21.00 | 0 | 47.00 | 9 |
| WEST NORTH CENTRAL |  |  |  | 2 |
| SOUTHEAST | 30.00 | 0 | 55.00 | 7 |
| WEST SOUTH CENTRAL | 0 | 0 | 7.75 | 4 |
| MOUNTAIN |  |  |  | 0 |
| PACIFIC |  |  |  | 3 |
| CANADA | 34.90 | 9.10 | 47.30 | 7 |
| NUMBER OF STORES |  |  |  |  |
| 1 STORE | 31.00 | 8.00 | 100.00 | 18 |
| 2 - 10 STORES | 21.60 | 0 | 55.00 | 15 |
| 10 + STORES | 35.00 | 20.00 | 55.00 | 15 |

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

## TABLE 30

# TYPICAL WASTE DISPOSAL FEE PER TON IN DECEMBER 1988

| | MEDIAN | MIDDLE RANGE | | NUMBER PARTICIPATING |
|---|---|---|---|---|
| ALL COMPANIES | $43.10 | $23.50 | $88.50 | 48 |
| COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS) | | | | |
| UNDER 10 MILLION | 43.00 | 0 | 100.00 | 13 |
| 10 - 30 MILLION | 25.00 | 0 | 45.00 | 11 |
| 31 - 100 | 42.00 | 30.00 | 90.00 | 7 |
| 101 - 250 | | | | 3 |
| 251 - 500 | | | | 1 |
| OVER 500 | 45.00 | 35.00 | 78.80 | 13 |
| GEOGRAPHIC REGION OF STORES | | | | |
| NORTHEAST | 89.50 | 65.50 | 97.50 | 8 |
| MID ATLANTIC | 45.00 | 35.00 | 51.00 | 9 |
| EAST NORTH CENTRAL | 33.50 | 0 | 61.00 | 8 |
| WEST NORTH CENTRAL | | | | 2 |
| SOUTHEAST | 30.00 | 12.50 | 50.30 | 8 |
| WEST SOUTH CENTRAL | 0 | 0 | 8.00 | 4 |
| MOUNTAIN | | | | 0 |
| PACIFIC | | | | 3 |
| CANADA | 35.70 | 33.20 | 49.40 | 6 |
| NUMBER OF STORES | | | | |
| 1 STORE | 45.00 | 15.00 | 100.00 | 17 |
| 2 - 10 STORES | 30.00 | 0 | 47.00 | 15 |
| 10 + STORES | 42.80 | 35.00 | 83.90 | 16 |

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

## TABLE 31A
## PERCENTAGE OF COMPANIES USING A CENTRALIZED PRODUCT RECLAIM CENTER

| | ALL COMPANIES | ANNUAL SALES IN MILLIONS | | | | | | NUMBER OF STORES | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | | UNDER $10 | $10-30 | $31-100 | $101-250 | $251-500 | $501+ | 1 | 2-10 | 11+ |
| TOTAL COMPANIES | 202 | 76 | 37 | 34 | 14 | 9 | 32 | 83 | 66 | 53 |
| PERCENTAGE OF COMPANIES USING A PRODUCT RECLAIM CENTER | 45.5% | 38.2% | 40.5% | 38.2% | 42.9% | 44.4% | 78.1% | 41.0% | 36.4% | 64.2% |

## TABLE 31B
## PERCENTAGE OF COMPANIES USING A CENTRALIZED PRODUCT RECLAIM CENTER

| | ALL COMPANIES | GEOGRAPHIC REGION OF HEADQUARTERS | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | | NEW ENGLAND | MIDDLE ATLANTIC | EAST NORTH CENTRAL | WEST NORTH CENTRAL | SOUTH EAST | WEST SOUTH CENTRAL | MOUNTAIN | PACIFIC | CANADA |
| TOTAL COMPANIES | 202 | 17 | 26 | 52 | 15 | 33 | 15 | 10 | 30 | 4 |
| PERCENTAGE OF COMPANIES USING A PRODUCT RECLAIM CENTER | 45.5% | 47.1% | 34.6% | 55.8% | 53.3% | 30.3% | 46.7% | 50.0% | 53.3% | - |

## TABLE 32A
## PERCENTAGE OF COMPANIES THAT OPERATE THE CENTER OR USE A THIRD PARTY'S CENTER

| | ALL COMPANIES | ANNUAL SALES IN MILLIONS | | | | | | NUMBER OF STORES | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | | UNDER $10 | $10-30 | $31-100 | $101-250 | $251-500 | $501+ | 1 | 2-10 | 11+ |
| TOTAL COMPANIES THAT USE A PRODUCT RECLAIM CENTER | 92 | 29 | 15 | 13 | 6 | 4 | 25 | 34 | 24 | 34 |
| PERCENTAGE OF COMPANIES THAT OPERATE THE CENTER | 21.7% | - | 6.7% | - | 16.7% | 50.0% | 64.0% | - | 4.2% | 55.9% |
| PERCENTAGE OF COMPANIES THAT USE A THIRD PARTY'S CENTER | 78.3 | 100.0 | 86.7 | 100.0 | 83.3 | 50.0 | 40.0 | 97.1 | 95.8 | 47.1 |

## TABLE 32B
## PERCENTAGE OF COMPANIES THAT OPERATE THE CENTER OR USE A THIRD PARTY'S CENTER

| | ALL COMPANIES | GEOGRAPHIC REGION OF HEADQUARTERS | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | | NEW ENGLAND | MIDDLE ATLANTIC | EAST NORTH CENTRAL | WEST NORTH CENTRAL | SOUTH EAST | WEST SOUTH CENTRAL | MOUNTAIN | PACIFIC | CANADA |
| TOTAL COMPANIES THAT USE A PRODUCT RECLAIM CENTER | 92 | 8 | 9 | 29 | 8 | 10 | 7 | 5 | 16 | 0 |
| PERCENTAGE OF COMPANIES THAT OPERATE THE CENTER | 21.7% | 37.5% | 44.4% | 6.9% | 12.5% | 40.0% | 14.3% | 40.0% | 18.8% | |
| PERCENTAGE OF COMPANIES THAT USE A THIRD PARTY'S CENTER | 78.3 | 62.5 | 66.7 | 93.1 | 87.5 | 60.0 | 85.7 | 60.0 | 75.0 | |

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

### TABLE 33A
## PROFILE OF PARTICIPANTS

| | | ANNUAL SALES IN MILLIONS | | | | | | | | NUMBER OF STORES | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | ALL COMPANIES | UNDER $10 | $10-$30 | $31-$100 | $101-$250 | $251-$500 | $501-$1 BIL | $1-$3 BILL | OVER $3 BILL | 1 | 2-10 | 11+ |
| TOTAL COMPANIES | 189 | 51 | 46 | 20 | 18 | 15 | 25 | 7 | 7 | 52 | 65 | 72 |

### TABLE 33B
## PROFILE OF PARTICIPANTS

| | | GEOGRAPHIC REGION OF HEADQUARTERS | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | ALL COMPANIES | NEW ENGLAND | MIDDLE ATLANTIC | EAST NORTH CENTRAL | WEST NORTH CENTRAL | SOUTH EAST | WEST SOUTH CENTRAL | MOUNTAIN | PACIFIC |
| TOTAL COMPANIES | 189 | 15 | 27 | 43 | 19 | 39 | 11 | 13 | 22 |

### TABLE 34A
## PERCENTAGE OF RESPONDENTS HAVING DIFFICULTY RECRUITING THE FOLLOWING POSITIONS

| | | ANNUAL SALES IN MILLIONS | | | | | | | | NUMBER OF STORES | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | ALL COMPANIES | UNDER $10 | $10-$30 | $31-$100 | $101-$250 | $251-$500 | $501-$1 BIL | $1-$3 BILL | OVER $3 BILL | 1 | 2-10 | 11+ |
| TOTAL RESPONDENTS | 154 | 36 | 41 | 17 | 14 | 12 | 20 | 7 | 7 | 39 | 56 | 59 |
| STORE MANAGERS | 28.6% | 25.0% | 24.4% | 52.9% | 21.4% | 50.0% | 20.0% | 28.6% | 14.3% | 20.5% | 35.7% | 27.1% |
| FULL-TIME PERSONNEL BELOW THE LEVEL OF MANAGER | 49.4 | 61.1 | 56.1 | 58.8 | 42.9 | 41.7 | 30.0 | 28.6 | 28.6 | 59.0 | 58.9 | 33.9 |
| PART-TIME PERSONNEL BELOW THE LEVEL OF MANAGER | 89.0 | 88.9 | 87.8 | 82.4 | 92.9 | 75.0 | 95.0 | 100.0 | 100.0 | 89.7 | 83.9 | 93.2 |

### TABLE 34B
## PERCENTAGE OF RESPONDENTS HAVING DIFFICULTY RECRUITING THE FOLLOWING POSITIONS

| | | GEOGRAPHIC REGION OF HEADQUARTERS | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | ALL COMPANIES | NEW ENGLAND | MIDDLE ATLANTIC | EAST NORTH CENTRAL | WEST NORTH CENTRAL | SOUTH EAST | WEST SOUTH CENTRAL | MOUNTAIN | PACIFIC |
| TOTAL RESPONDENTS | 154 | 14 | 23 | 35 | 19 | 31 | 9 | 6 | 17 |
| STORE MANAGERS | 28.6% | 21.4% | 34.8% | 28.6% | 5.3% | 35.5% | 33.3% | 33.3% | 35.3% |
| FULL-TIME PERSONNEL BELOW THE LEVEL OF MANAGER | 49.4 | 57.1 | 56.5 | 45.7 | 26.3 | 67.7 | 66.7 | 33.3 | 29.4 |
| PART-TIME PERSONNEL BELOW THE LEVEL OF MANAGER | 89.0 | 100.0 | 87.0 | 97.1 | 89.5 | 87.1 | 88.9 | 66.7 | 76.5 |

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

### TABLE 35

## MEDIAN OF AVAILABLE POSITIONS NOT BEING FILLED FOR LACK OF PERSONNEL IN A TYPICAL STORE

| | MEDIAN | MIDDLE RANGE | | NUMBER PARTICIPATING |
|---|---|---|---|---|
| ALL COMPANIES | 5.0% | 0% | 10.0% | 164 |
| COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS) | | | | |
| UNDER 10 | 5.0 | 0 | 10.0 | 44 |
| 10 - 30 | 5.0 | 0 | 10.0 | 42 |
| 31 - 100 | 5.0 | 0 | 6.0 | 14 |
| 101 - 250 | 1.0 | 0 | 5.0 | 17 |
| 251 - 500 | 3.0 | 0 | 10.0 | 13 |
| 500 - 1 BILLION | 4.0 | 0 | 9.0 | 22 |
| 1 - 3 BILLION | 9.0 | 3.0 | 10.0 | 6 |
| OVER 3 BILLION | 7.5 | 5.0 | 10.0 | 6 |
| GEOGRAPHIC REGION OF HEADQUARTERS | | | | |
| NEW ENGLAND | 10.0 | 5.0 | 10.0 | 13 |
| MID ATLANTIC | 10.0 | 5.0 | 10.0 | 22 |
| EAST NORTH CENTRAL | 2.0 | 0 | 8.0 | 37 |
| WEST NORTH CENTRAL | 4.0 | 0 | 9.0 | 17 |
| SOUTHEAST | 5.0 | 1.0 | 10.0 | 31 |
| WEST SOUTH CENTRAL | 1.5 | 0 | 5.0 | 10 |
| MOUNTAIN | 2.0 | 0 | 5.0 | 13 |
| PACIFIC | 0 | 0 | 5.0 | 21 |
| NUMBER OF STORES | | | | |
| 1 STORE | 5.0 | 0 | 10.0 | 43 |
| 2 - 10 STORES | 5.0 | 0 | 10.0 | 56 |
| 11 + STORES | 4.0 | 0 | 10.0 | 65 |

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

## TABLE 36A

# PERCENTAGE OF COMPANIES USING THE FOLLOWING METHODS FOR RECRUITING EMPLOYEES

| | | ANNUAL SALES IN MILLIONS | | | | | | | | NUMBER OF STORES | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | ALL COMPANIES | UNDER $10 | $10-$30 | $31-$100 | $101-$250 | $251-$500 | $501-$1 BIL | $1-$3 BILL | OVER $3 BILL | 1 | 2-10 | 11+ |
| TOTAL RESPONDENTS | 189 | 51 | 46 | 20 | 18 | 15 | 25 | 7 | 7 | 52 | 65 | 72 |
| HIRING IN INDIVIDUAL STORES | 75.1% | 49.0% | 73.9% | 80.0% | 83.3% | 100.0% | 92.0% | 100.0% | 100.0% | 40.4% | 83.1% | 93.1% |
| POSTING JOBS WITHIN THE COMPANY | 67.2 | 41.2 | 65.2 | 75.0 | 83.3 | 73.3 | 92.0 | 85.7 | 85.7 | 48.1 | 69.2 | 79.2 |
| NEWSPAPER ADVERTISING | 65.6 | 43.1 | 58.7 | 85.0 | 72.2 | 93.3 | 72.0 | 85.7 | 100.0 | 48.1 | 64.6 | 79.2 |
| LISTING WITH STATE EMPLOYMENT AGENCIES | 58.2 | 37.3 | 43.5 | 75.0 | 55.6 | 73.3 | 88.0 | 100.0 | 85.7 | 32.7 | 55.4 | 79.2 |
| DECA OR OTHER VOCATIONAL AWARENESS PROGRAMS | 51.9 | 27.5 | 45.7 | 65.0 | 61.1 | 53.3 | 76.0 | 85.7 | 85.7 | 40.4 | 40.0 | 70.8 |
| PARTICIPATING IN HIGH SCHOOL JOB FAIRS | 45.5 | 23.5 | 26.1 | 60.0 | 61.1 | 66.7 | 76.0 | 85.7 | 57.1 | 25.0 | 32.3 | 72.2 |
| HIGH SCHOOL AND JUNIOR HIGH SCHOOL CAREER AWARENESS PROGRAMS | 45.5 | 29.4 | 30.4 | 45.0 | 50.0 | 53.3 | 80.0 | 85.7 | 71.4 | 30.8 | 33.8 | 66.7 |
| VISITING COLLEGE CAREER CENTERS | 30.2 | 5.9 | 23.9 | 25.0 | 38.9 | 33.3 | 60.0 | 100.0 | 57.1 | 13.5 | 20.0 | 51.4 |
| PARTICIPATING IN COLLEGE JOB FAIRS | 24.9 | - | 15.2 | 20.0 | 33.3 | 26.7 | 68.0 | 71.4 | 57.1 | 5.8 | 13.8 | 48.6 |
| RUNNING INTERNAL JOB FAIRS | 18.0 | 9.8 | 10.9 | 5.0 | 16.7 | 26.7 | 36.0 | 57.1 | 42.9 | 7.7 | 12.3 | 30.6 |
| MULTIPLE EMPLOYMENT CENTERS | 15.9 | 3.9 | 4.3 | 15.0 | 11.1 | 13.3 | 44.0 | 85.7 | 28.6 | 3.8 | 6.2 | 33.3 |
| MARKETING ADS (IMAGE ADS) | 15.9 | 3.9 | 13.0 | 10.0 | - | 40.0 | 32.0 | 42.9 | 42.9 | 7.7 | 9.2 | 27.8 |
| RADIO ADVERTSING | 14.3 | 2.0 | 4.3 | 10.0 | 16.7 | 33.3 | 20.0 | 71.4 | 57.1 | 5.8 | 4.6 | 29.2 |
| MOBILE EMPLOYMENT OFFICES | 6.9 | 2.0 | - | 5.0 | 11.1 | 20.0 | 20.0 | 14.3 | - | 1.9 | 1.5 | 15.3 |
| TELEVISION ADVERTISING | 3.7 | - | 4.3 | 5.0 | 5.6 | - | 4.0 | 14.3 | 14.3 | - | 3.1 | 6.9 |

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

## TABLE 36B

# PERCENTAGE OF COMPANIES USING THE FOLLOWING METHODS FOR RECRUITING EMPLOYEES

| | | GEOGRAPHIC REGION OF HEADQUARTERS | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | ALL COMPANIES | NEW ENGLAND | MIDDLE ATLANTIC | EAST NORTH CENTRAL | WEST NORTH CENTRAL | SOUTH EAST | WEST SOUTH CENTRAL | MOUNTAIN | PACIFIC |
| TOTAL RESPONDENTS | 189 | 15 | 27 | 43 | 19 | 39 | 11 | 13 | 22 |
| HIRING IN INDIVIDUAL STORES | 75.1% | 86.7% | 81.5% | 60.5% | 100.0% | 74.4% | 90.9% | 46.2% | 77.3% |
| POSTING JOBS WITHIN THE COMPANY | 67.2 | 73.3 | 74.1 | 69.8 | 84.2 | 48.7 | 63.6 | 53.8 | 77.3 |
| NEWSPAPER ADVERTISING | 65.6 | 93.3 | 77.8 | 58.1 | 63.2 | 53.8 | 45.5 | 76.9 | 72.7 |
| LISTING WITH STATE EMPLOYMENT AGENCIES | 58.2 | 73.3 | 74.1 | 34.9 | 52.6 | 61.5 | 63.6 | 69.2 | 63.6 |
| DECA OR OTHER VOCATIONAL AWARENESS PROGRAMS | 51.9 | 33.3 | 55.6 | 39.5 | 68.4 | 61.5 | 81.8 | 53.8 | 36.4 |
| PARTICIPATING IN HIGH SCHOOL JOB FAIRS | 45.5 | 46.7 | 66.7 | 30.2 | 52.6 | 51.3 | 45.5 | 46.2 | 31.8 |
| HIGH SCHOOL AND JUNIOR HIGH SCHOOL CAREER AWARENESS PROGRAMS | 45.5 | 40.0 | 77.8 | 39.5 | 31.6 | 46.2 | 27.3 | 38.5 | 45.5 |
| VISITING COLLEGE CAREER CENTERS | 30.2 | 33.3 | 44.4 | 23.3 | 47.4 | 25.6 | 27.3 | - | 36.4 |
| PARTICIPATING IN COLLEGE JOB FAIRS | 24.9 | 33.3 | 44.4 | 18.6 | 31.6 | 23.1 | 9.1 | 7.7 | 22.7 |
| RUNNING INTERNAL JOB FAIRS | 18.0 | 26.7 | 37.0 | 16.3 | 5.3 | 15.4 | 27.3 | 7.7 | 9.1 |
| MULTIPLE EMPLOYMENT CENTERS | 15.9 | - | 18.5 | 9.3 | 31.6 | 15.4 | 27.3 | 7.7 | 22.7 |
| MARKETING ADS (IMAGE ADS) | 15.9 | 13.3 | 44.4 | 16.3 | 15.8 | 10.3 | - | 7.7 | 4.5 |
| RADIO ADVERTSING | 14.3 | - | 44.4 | 9.3 | 10.5 | 17.9 | - | 7.7 | 4.5 |
| MOBILE EMPLOYMENT OFFICES | 6.9 | 13.3 | 7.4 | 7.0 | 10.5 | 5.1 | - | 7.7 | 4.5 |
| TELEVISION ADVERTISING | 3.7 | - | 7.4 | 4.7 | - | 7.7 | - | - | - |

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

## TABLE 37A
# PERCENTAGE OF COMPANIES MAKING OUTREACH ATTEMPTS TOWARD THE FOLLOWING GROUPS

| | | ANNUAL SALES IN MILLIONS | | | | | | | | NUMBER OF STORES | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | ALL COMPANIES | UNDER $10 | $10-$30 | $31-$100 | $101-$250 | $251-$500 | $501-$1 BIL | $1-$3 BILL | OVER $3 BILL | 1 | 2-10 | 11+ |
| TOTAL RESPONDENTS | 138 | 30 | 30 | 15 | 16 | 12 | 21 | 7 | 7 | 30 | 49 | 59 |
| PHYSICALLY HANDICAPPED | 40.6% | 20.0% | 20.0% | 46.7% | 37.5% | 50.0% | 71.4% | 100% | 42.9% | 20.0% | 28.6% | 61.0% |
| DEVELOPMENTALLY DISABLED | 43.5 | 30.0 | 36.7 | 60.0 | 31.3 | 50.0 | 47.6 | 100.0 | 42.9 | 36.7 | 34.7 | 54.2 |
| SENIOR CITIZENS | 86.2 | 76.7 | 83.3 | 80.0 | 87.5 | 83.3 | 100.0 | 100.0 | 100.0 | 83.3 | 81.6 | 91.5 |
| MEMBERS OF MINORITY GROUPS | 54.3 | 33.3 | 30.0 | 40.0 | 62.5 | 58.3 | 95.2 | 100.0 | 85.7 | 46.7 | 28.6 | 79.7 |

## TABLE 37B
# PERCENTAGE OF COMPANIES MAKING OUTREACH ATTEMPTS TOWARD THE FOLLOWING GROUPS

| | | GEOGRAPHIC REGION OF HEADQUARTERS | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | ALL COMPANIES | NEW ENGLAND | MIDDLE ATLANTIC | EAST NORTH CENTRAL | WEST NORTH CENTRAL | SOUTH EAST | WEST SOUTH CENTRAL | MOUNTAIN | PACIFIC |
| TOTAL RESPONDENTS | 138 | 12 | 22 | 34 | 14 | 28 | 6 | 6 | 16 |
| PHYSICALLY HANDICAPPED | 40.6% | 41.7% | 45.5% | 29.4% | 50.0% | 35.7% | 33.3% | 83.3% | 43.8% |
| DEVELOPMENTALLY DISABLED | 43.5 | 66.7 | 68.2 | 32.4 | 35.7 | 28.6 | 33.3 | 50.0 | 50.0 |
| SENIOR CITIZENS | 86.2 | 83.3 | 100.0 | 85.3 | 100.0 | 82.1 | 50.0 | 83.3 | 81.3 |
| MEMBERS OF MINORITY GROUPS | 54.3 | 25.0 | 81.8 | 44.1 | 50.0 | 57.1 | 50.0 | 83.3 | 50.0 |

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

### TABLE 38A

## PERCENTAGE OF COMPANIES OFFERING SPECIFIC TRAINING TO SUPERVISORS TO SUPPORT SPECIFIC GROUPS ONCE HIRED

| | | ANNUAL SALES IN MILLIONS | | | | | | | | NUMBER OF STORES | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | ALL COMPANIES | UNDER $10 | $10-$30 | $31-$100 | $101-$250 | $251-$500 | $501-$1 BIL | $1-$3 BILL | OVER $3 BILL | 1 | 2-10 | 11+ |
| TOTAL RESPONDENTS | 121 | 26 | 25 | 15 | 11 | 11 | 21 | 7 | 5 | 25 | 43 | 53 |
| COMPANIES OFFERING SPECIAL TRAINING | 43.8% | 50.0% | 48.0% | 26.7% | 36.4% | 27.3% | 38.1% | 71.4% | 80.0% | 48.0% | 41.9% | 43.4% |
| COMPANIES NOT OFFERING SPECIAL TRAINING | 56.2 | 50.0 | 52.0 | 73.3 | 63.6 | 72.7 | 61.9 | 28.6 | 20.0 | 52.0 | 58.1 | 56.6 |

### TABLE 38B

## PERCENTAGE OF COMPANIES OFFERING SPECIFIC TRAINING TO SUPERVISORS TO SUPPORT SPECIFIC GROUPS ONCE HIRED

| | | GEOGRAPHIC REGION OF HEADQUARTERS | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | ALL COMPANIES | NEW ENGLAND | MIDDLE ATLANTIC | EAST NORTH CENTRAL | WEST NORTH CENTRAL | SOUTH EAST | WEST SOUTH CENTRAL | MOUNTAIN | PACIFIC |
| TOTAL RESPONDENTS | 121 | 11 | 22 | 28 | 11 | 22 | 6 | 6 | 15 |
| COMPANIES OFFERING SPECIAL TRAINING | 43.8% | 45.5% | 31.8% | 46.4% | 36.4% | 45.5% | 50.0% | 50.0% | 53.3% |
| COMPANIES NOT OFFERING SPECIAL TRAINING | 56.2 | 54.5 | 68.2 | 53.6 | 63.6 | 54.5 | 50.0 | 50.0 | 46.7 |

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

THIS TABLE IS A PERCENTAGE BREAKOUT OF THOSE WHO ANSWERED YES OR NO TO QUESTION 9 ON THE SURVEY

## TABLE 39A
# PERCENTAGE OF COMPANIES HAVING A FORMAL AIDS POLICY

| | | ANNUAL SALES IN MILLIONS | | | | | | | | NUMBER OF STORES | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | ALL COMPANIES | UNDER $10 | $10-$30 | $31-$100 | $101-$250 | $251-$500 | $501-$1 BIL | $1-$3 BILL | OVER $3 BILL | 1 | 2-10 | 11+ |
| TOTAL RESPONDENTS | 188 | 51 | 46 | 20 | 18 | 15 | 25 | 7 | 6 | 52 | 65 | 71 |
| COMPANIES WITH A FORMAL AIDS POLICY | 20.2% | 3.9% | 8.7% | 30.0% | 16.7% | 26.7% | 52.0% | 57.1% | 33.3% | 11.5% | 7.7% | 38.0% |
| COMPANIES WITHOUT A FORMAL AIDS POLICY | 79.8 | 96.1 | 91.3 | 70.0 | 83.3 | 73.3 | 48.0 | 42.9 | 66.7 | 88.5 | 92.3 | 62.0 |

## TABLE 39B
# PERCENTAGE OF COMPANIES HAVING A FORMAL AIDS POLICY

| | | GEOGRAPHIC REGION OF HEADQUARTERS | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | ALL COMPANIES | NEW ENGLAND | MIDDLE ATLANTIC | EAST NORTH CENTRAL | WEST NORTH CENTRAL | SOUTH EAST | WEST SOUTH CENTRAL | MOUNTAIN | PACIFIC |
| TOTAL RESPONDENTS | 188 | 15 | 27 | 43 | 19 | 39 | 11 | 12 | 22 |
| COMPANIES WITH A FORMAL AIDS POLICY | 20.2% | 40.0% | 37.0% | 14.0% | 21.1% | 15.4% | 18.2% | 16.7% | 9.1% |
| COMPANIES WITHOUT A FORMAL AIDS POLICY | 79.8 | 60.0 | 63.0 | 86.0 | 78.9 | 84.6 | 81.8 | 83.3 | 90.9 |

## TABLE 40A
# PERCENTAGE OF COMPANIES THAT HAVE AN EMPLOYEE ASSISTANCE PROGRAM IN PLACE

| | | ANNUAL SALES IN MILLIONS | | | | | | | | NUMBER OF STORES | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | ALL COMPANIES | UNDER $10 | $10-$30 | $31-$100 | $101-$250 | $251-$500 | $501-$1 BIL | $1-$3 BILL | OVER $3 BILL | 1 | 2-10 | 11+ |
| TOTAL RESPONDENTS | 188 | 51 | 46 | 20 | 18 | 15 | 25 | 7 | 6 | 52 | 65 | 71 |
| COMPANIES THAT HAVE AN EMPLOYEE ASSISTANCE PROGRAM IN PLACE | 22.3% | 9.8% | 10.9% | 10.0% | 44.4% | 20.0% | 48.0% | 57.1% | 50.0% | 11.5% | 10.8% | 40.8% |
| COMPANIES THAT DO NOT HAVE AN EMPLOYEE ASSISTANCE PROGRAM IN PLACE | 77.7 | 90.2 | 89.1 | 90.0 | 55.6 | 80.0 | 52.0 | 42.9 | 50.0 | 88.5 | 89.2 | 59.2 |

## TABLE 40B
# PERCENTAGE OF COMPANIES THAT HAVE AN EMPLOYEE ASSISTANCE PROGRAM IN PLACE

| | | GEOGRAPHIC REGION OF HEADQUARTERS | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | ALL COMPANIES | NEW ENGLAND | MIDDLE ATLANTIC | EAST NORTH CENTRAL | WEST NORTH CENTRAL | SOUTH EAST | WEST SOUTH CENTRAL | MOUNTAIN | PACIFIC |
| TOTAL RESPONDENTS | 188 | 15 | 27 | 43 | 19 | 39 | 11 | 12 | 22 |
| COMPANIES THAT HAVE AN EMPLOYEE ASSISTANCE PROGRAM IN PLACE | 22.3% | 40.0% | 29.6% | 18.6% | 10.5% | 17.9% | 27.3% | 33.3% | 18.2% |
| COMPANIES THAT DO NOT HAVE AN EMPLOYEE ASSISTANCE PROGRAM IN PLACE | 77.7 | 60.0 | 70.4 | 81.4 | 89.5 | 82.1 | 72.7 | 66.7 | 81.8 |

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

## TABLE 41

## COMPANIES WITH AN EMPLOYEE ASSISTANCE PROGRAM IN PLACE

| | | ANNUAL SALES IN MILLIONS | | | | NUMBER OF STORES | | |
|---|---|---|---|---|---|---|---|---|
| | ALL COMPANIES | UNDER $30 | $30-$250 | $251-$1 BIL | OVER $1 BIL | 1 | 2-10 | 11+ |
| TOTAL RESPONDENTS WITH AN EMPLOYEE ASSISTANCE PROGRAM | 41 | 9 | 10 | 15 | 7 | 5 | 7 | 29 |
| PROGRAM OPERATED WITHIN THE COMPANY | 24.4% | 44.4% | 20.0% | 20.0% | 14.3% | 60.0% | 14.3% | 20.7% |
| PROGRAM OPERATED OUTSIDE THE COMPANY | 61.0 | 33.3 | 80.0 | 73.3 | 42.9 | 20.0 | 71.4 | 65.5 |
| BOTH | 14.6 | 22.2 | - | 6.7 | 42.9 | 20.0 | 14.3 | 13.8 |

## TABLE 42

## PERCENTAGE OF COMPANIES OFFERING THE FOLLOWING TYPE OF AN EMPLOYEE ASSISTANCE PROGRAM

| | | ANNUAL SALES IN MILLIONS | | | | NUMBER OF STORES | | |
|---|---|---|---|---|---|---|---|---|
| | ALL COMPANIES | UNDER $30 | $30-$250 | $251-$1 BIL | OVER $1 BIL | 1 | 2-10 | 11+ |
| TOTAL RESPONDENTS WITH AN EMPLOYEE ASSISTANCE PROGRAM | 39 | 8 | 10 | 14 | 7 | 5 | 6 | 28 |
| PROGRAM FOR ALCOHOL AND DRUGS ONLY | 15.4% | - | 30.0% | 14.3% | 14.3% | - | 16.7% | 17.9% |
| A "BROADBRUSH" PROGRAM | 84.6 | 100.0 | 70.0 | 85.7 | 85.7 | 100.0 | 83.3 | 82.1 |

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

### TABLE 43

## PERCENTAGE OF COMPANIES OFFERING AN EAP PROGRAM TO:

| | | ANNUAL SALES IN MILLIONS | | | | NUMBER OF STORES | | |
|---|---|---|---|---|---|---|---|---|
| | ALL COMPANIES | UNDER $30 | $30-$250 | $251-$1 BIL | OVER $1 BIL | 1 | 2-10 | 11+ |
| TOTAL RESPONDENTS WITH AN EMPLOYEE ASSISTANCE PROGRAM | 41 | 10 | 10 | 14 | 7 | 6 | 7 | 28 |
| MANAGEMENT ONLY | 7.3% | 20.0% | - | 7.1% | - | 16.7% | 14.3% | 3.6% |
| ALL FULL-TIMERS ONLY | 9.8 | 10.0 | - | 21.4 | - | 16.7 | - | 10.7 |
| ALL EMPLOYEES, BOTH FULL AND PART-TIME | 80.5 | 70.0 | 90.0 | 71.4 | 100.0 | 66.7 | 85.7 | 82.1 |
| MANAGEMENT AND FULL-TIMERS ONLY | 2.4 | - | 10.0 | - | - | - | - | 3.6 |

### TABLE 44

## PERCENTAGE OF COMPANIES THAT DO NOT HAVE AN EMPLOYEE ASSISTANCE PROGRAM

| | | ANNUAL SALES IN MILLIONS | | | | | | | NUMBER OF STORES | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | ALL COMPANIES | UNDER $10 | $10-$30 | $31-$100 | $101-$250 | $251-$500 | $501-$1 BIL | OVER $1 BIL | 1 | 2-10 | 11+ |
| TOTAL RESPONDENTS THAT DO NOT HAVE AN EMPLOYEE ASSISTANCE PROGRAM | 125 | 39 | 36 | 16 | 7 | 12 | 11 | 4 | 41 | 48 | 36 |
| PLAN TO IMPLEMENT PROGRAM IN THE NEXT 12 MONTHS | 13.6% | 5.1% | 8.3% | 25.0% | 14.3% | 16.7% | 36.4% | 25.0% | 9.8% | 12.5% | 19.4% |
| PLAN TO IMPLEMENT PROGRAM IN THE NEXT 24 MONTHS | 12.8 | 7.7 | 19.4 | 12.5 | - | 16.7 | 18.2 | - | 9.8 | 16.7 | 11.1 |
| DO NOT PLAN TO IMPLEMENT A PROGRAM AT ALL | 73.6 | 87.2 | 72.2 | 62.5 | 85.7 | 66.7 | 45.5 | 75.0 | 80.5 | 70.8 | 69.4 |

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

TABLE 45A

## PERCENTAGE OF COMPANIES OFFERING HEALTH INSURANCE PLANS FOR:

| | | ANNUAL SALES IN MILLIONS | | | | | | | | NUMBER OF STORES | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | ALL COMPANIES | UNDER $10 | $10-$30 | $31-$100 | $101-$250 | $251-$500 | $501-$1 BIL | $1-$3 BILL | OVER $3 BILL | 1 | 2-10 | 11+ |
| TOTAL RESPONDENTS | 181 | 49 | 43 | 19 | 18 | 15 | 24 | 7 | 6 | 51 | 60 | 70 |
| FULL-TIMERS ONLY | 51.9% | 73.5% | 72.1% | 57.9% | 44.4% | 6.7% | 25.0% | - | 16.7% | 68.6% | 73.3% | 21.4% |
| BOTH FULL AND PART TIMERS | 48.1 | 26.5 | 27.9 | 42.1 | 55.6 | 93.3 | 75.0 | 100.0 | 83.3 | 31.4 | 26.7 | 78.6 |

TABLE 45B

## PERCENTAGE OF COMPANIES OFFERING HEALTH INSURANCE PLANS FOR:

| | | GEOGRAPHIC REGION OF HEADQUARTERS | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | ALL COMPANIES | NEW ENGLAND | MIDDLE ATLANTIC | EAST NORTH CENTRAL | WEST NORTH CENTRAL | SOUTH EAST | WEST SOUTH CENTRAL | MOUNTAIN | PACIFIC |
| TOTAL RESPONDENTS | 181 | 14 | 27 | 43 | 18 | 36 | 11 | 11 | 21 |
| FULL-TIMERS ONLY | 51.9% | 64.3% | 25.9% | 62.8% | 44.4% | 75.0% | 72.7% | 45.5% | 14.3% |
| BOTH FULL AND PART TIMERS | 48.1 | 35.7 | 74.1 | 37.2 | 55.6 | 25.0 | 27.3 | 54.5 | 85.7 |

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

## TABLE 46
# MEDIAN DEDUCTIBLE FOR FULL-TIMERS

| | MEDIAN | MIDDLE RANGE | | NUMBER PARTICIPATING |
|---|---|---|---|---|
| ALL COMPANIES | $100.0 | $50.0 | $200.0 | 142 |
| COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS) | | | | |
| UNDER 10 | 150.0 | 23.0 | 200.0 | 37 |
| 10 - 30 | 100.0 | 100.0 | 200.0 | 36 |
| 31 - 100 | 100.0 | 100.0 | 200.0 | 15 |
| 101 - 250 | 100.0 | 50.0 | 150.0 | 13 |
| 251 - 500 | 100.0 | 50.0 | 125.0 | 12 |
| 500 - 1 BILLION | 100.0 | 100.0 | 200.0 | 19 |
| 1 - 3 BILLION | 100.0 | 100.0 | 100.0 | 6 |
| OVER 3 BILLION | 100.0 | 75.0 | 162.5 | 4 |
| GEOGRAPHIC REGION OF HEADQUARTERS | | | | |
| NEW ENGLAND | 100.0 | 50.0 | 200.0 | 9 |
| MID ATLANTIC | 100.0 | 100.0 | 100.0 | 20 |
| EAST NORTH CENTRAL | 100.0 | 40.0 | 200.0 | 33 |
| WEST NORTH CENTRAL | 100.0 | 0 | 125.0 | 16 |
| SOUTHEAST | 175.0 | 100.0 | 200.0 | 26 |
| WEST SOUTH CENTRAL | 200.0 | 150.0 | 275.0 | 9 |
| MOUNTAIN | 100.0 | 10.0 | 200.0 | 9 |
| PACIFIC | 100.0 | 25.0 | 200.0 | 20 |
| NUMBER OF STORES | | | | |
| 1 STORE | 100.0 | 10.0 | 200.0 | 38 |
| 2 - 10 STORES | 100.0 | 100.0 | 200.0 | 50 |
| 11 + STORES | 100.0 | 100.0 | 150.0 | 54 |

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

## TABLE 47
# MEDIAN DEDUCTIBLE FOR PART-TIMERS

| | MEDIAN | MIDDLE RANGE | | NUMBER PARTICIPATING |
|---|---|---|---|---|
| ALL COMPANIES | $100.0 | $97.5 | $200.0 | 60 |
| COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS) | | | | |
| UNDER 10 | 100.0 | 0 | 200.0 | 7 |
| 10 - 30 | 200.0 | 100.0 | 200.0 | 7 |
| 31 - 100 | 100.0 | 100.0 | 100.0 | 6 |
| 101 - 250 | 100.0 | 0 | 100.0 | 6 |
| 251 - 500 | 100.0 | 100.0 | 150.0 | 11 |
| 500 - 1 BILLION | 100.0 | 0 | 200.0 | 14 |
| 1 - 3 BILLION | 100.0 | 100.0 | 200.0 | 6 |
| OVER 3 BILLION | | | | 3 |
| GEOGRAPHIC REGION OF HEADQUARTERS | | | | |
| NEW ENGLAND | | | | 3 |
| MID ATLANTIC | 100.0 | 100.0 | 100.0 | 13 |
| EAST NORTH CENTRAL | 150.0 | 95.5 | 200.0 | 8 |
| WEST NORTH CENTRAL | 100.0 | 0 | 200.0 | 9 |
| SOUTHEAST | 100.0 | 97.5 | 175.0 | 4 |
| WEST SOUTH CENTRAL | | | | 2 |
| MOUNTAIN | 100.0 | 100.0 | 200.0 | 5 |
| PACIFIC | 100.0 | 75.0 | 175.0 | 16 |
| NUMBER OF STORES | | | | |
| 1 STORE | 100.0 | 45.5 | 200.0 | 8 |
| 2 - 10 STORES | 100.0 | 100.0 | 200.0 | 12 |
| 11 + STORES | 100.0 | 97.5 | 175.0 | 40 |

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

TABLE 48A

## PERCENTAGE OF COMPANIES OFFERING THE FOLLOWING BENEFITS

| | | ANNUAL SALES IN MILLIONS | | | | | | | | NUMBER OF STORES | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | ALL COMPANIES | UNDER $10 | $10-$30 | $31-$100 | $101-$250 | $251-$500 | $501-$1 BIL | $1-$3 BILL | OVER $3 BILL | 1 | 2-10 | 11+ |
| TOTAL RESPONDENTS | 189 | 51 | 46 | 20 | 18 | 15 | 25 | 7 | 7 | 52 | 65 | 72 |
| PAID VACATION | 98.4% | 98.0% | 100% | 100% | 94.4% | 93.3% | 100.0% | 100% | 100% | 98.1% | 100% | 97.2% |
| PAID HOLIDAYS | 91.5 | 82.4 | 93.5 | 90.0 | 100.0 | 93.3 | 100.0 | 100.0 | 85.7 | 90.4 | 87.7 | 95.8 |
| LIFE INSURANCE | 90.5 | 76.5 | 95.7 | 95.0 | 94.4 | 93.3 | 96.0 | 100.0 | 100.0 | 80.8 | 92.3 | 95.8 |
| RETIREMENT PLANS | 74.6 | 41.2 | 78.3 | 80.0 | 94.4 | 93.3 | 92.0 | 100.0 | 100.0 | 55.8 | 70.8 | 91.7 |
| PAID SICK LEAVE | 67.2 | 45.1 | 67.4 | 90.0 | 66.7 | 86.7 | 76.0 | 71.4 | 85.7 | 59.6 | 61.5 | 77.8 |
| PERSONAL HOLIDAYS | 58.7 | 35.3 | 47.8 | 75.0 | 61.1 | 86.7 | 92.0 | 71.4 | 57.1 | 40.4 | 53.8 | 76.4 |
| TUITION REIMBURSEMENT | 35.4 | 7.8 | 32.6 | 30.0 | 55.6 | 46.7 | 60.0 | 57.1 | 85.7 | 11.5 | 32.3 | 55.6 |
| TRANSPORTATION REIMBURSEMENT | 18.0 | 11.8 | 21.7 | 25.0 | 11.1 | 20.0 | 32.0 | - | - | 11.5 | 23.1 | 18.1 |
| HEALTH-CLUB MEMBERSHIPS | 6.9 | 5.9 | 13.0 | 5.0 | 5.6 | 6.7 | - | - | 14.3 | 5.8 | 10.8 | 4.2 |
| JOB SHARING | 3.7 | 3.9 | 6.5 | - | - | - | 8.0 | - | - | 1.9 | 6.2 | 2.8 |
| CHILD-CARE | 1.6 | - | - | 5.0 | 5.6 | 6.7 | - | - | - | - | 1.5 | 2.8 |

TABLE 48B

## PERCENTAGE OF COMPANIES OFFERING THE FOLLOWING BENEFITS

| | | GEOGRAPHIC REGION OF HEADQUARTERS | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | ALL COMPANIES | NEW ENGLAND | MIDDLE ATLANTIC | EAST NORTH CENTRAL | WEST NORTH CENTRAL | SOUTH EAST | WEST SOUTH CENTRAL | MOUNTAIN | PACIFIC |
| TOTAL RESPONDENTS | 189 | 15 | 27 | 43 | 19 | 39 | 11 | 13 | 22 |
| PAID VACATION | 98.4% | 100.0% | 100.0% | 100.0% | 94.7% | 100.0% | 100.0% | 100.0% | 90.9% |
| PAID HOLIDAYS | 91.5 | 100.0 | 100.0 | 88.4 | 89.5 | 89.7 | 81.8 | 92.3 | 90.9 |
| LIFE INSURANCE | 90.5 | 93.3 | 88.9 | 95.3 | 100.0 | 87.2 | 100.0 | 76.9 | 81.8 |
| RETIREMENT PLANS | 74.6 | 66.7 | 88.9 | 67.4 | 94.7 | 61.5 | 81.8 | 76.9 | 77.3 |
| PAID SICK LEAVE | 67.2 | 100.0 | 85.2 | 44.2 | 57.9 | 64.1 | 63.6 | 84.6 | 72.7 |
| PERSONAL HOLIDAYS | 58.7 | 80.0 | 81.5 | 53.5 | 63.2 | 43.6 | 72.7 | 30.8 | 59.1 |
| TUITION REIMBURSEMENT | 35.4 | 46.7 | 37.0 | 30.2 | 36.8 | 35.9 | 27.3 | 30.8 | 40.9 |
| TRANSPORTATION REIMBURSEMENT | 18.0 | 13.3 | 14.8 | 18.6 | 31.6 | 17.9 | - | 15.4 | 22.7 |
| HEALTH-CLUB MEMBERSHIPS | 6.9 | 6.7 | 7.4 | 7.0 | - | 5.1 | - | 7.7 | 18.2 |
| JOB SHARING | 3.7 | - | 7.4 | 2.3 | - | 7.7 | - | - | 4.5 |
| CHILD-CARE | 1.6 | 6.7 | 3.7 | - | - | 2.6 | - | - | - |

SOURCE FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

### TABLE 49A

## PERCENTAGE OF COMPANIES OFFERING THE FOLLOWING BENEFITS TO FULL-TIME EMPLOYEES ONLY

| | | ANNUAL SALES IN MILLIONS | | | | | | | | NUMBER OF STORES | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | ALL COMPANIES | UNDER $10 | $10-$30 | $31-$100 | $101-$250 | $251-$500 | $501-$1 BIL | $1-$3 BILL | OVER $3 BILL | 1 | 2-10 | 11+ |
| TOTAL RESPONDENTS | 189 | 51 | 46 | 20 | 18 | 15 | 25 | 7 | 7 | 52 | 65 | 72 |
| LIFE INSURANCE | 52.9% | 60.8% | 63.0% | 65.0% | 55.6% | 13.3% | 40.0% | - | 71.4% | 63.5% | 61.5% | 37.5% |
| PAID SICK LEAVE | 33.3 | 27.5 | 37.0 | 40.0 | 38.9 | 13.3 | 32.0 | 28.6 | 71.4 | 34.6 | 30.8 | 34.7 |
| PAID HOLIDAYS | 29.1 | 45.1 | 32.6 | 25.0 | 33.3 | - | 20.0 | - | 14.3 | 44.2 | 29.2 | 18.1 |
| PAID VACATION | 24.9 | 47.1 | 21.7 | 15.0 | 16.7 | 6.7 | 12.0 | - | 42.9 | 36.5 | 27.7 | 13.9 |
| RETIREMENT PLANS | 19.6 | 25.5 | 15.2 | 20.0 | 22.2 | 20.0 | 8.0 | - | 57.1 | 19.2 | 20.0 | 19.4 |
| TUITION REIMBURSEMENT | 19.6 | 5.9 | 17.4 | 15.0 | 22.2 | 20.0 | 40.0 | 28.6 | 57.1 | 7.7 | 15.4 | 31.9 |
| PERSONAL HOLIDAYS | 15.3 | 19.6 | 15.2 | 10.0 | 5.6 | 6.7 | 24.0 | 14.3 | 14.3 | 15.4 | 15.4 | 15.3 |
| TRANSPORTATION REIMBURSEMENT | 3.7 | 5.9 | 4.3 | - | 5.6 | - | 4.0 | - | - | 5.8 | 3.1 | 2.8 |
| HEALTH-CLUB MEMBERSHIPS | 3.7 | 5.9 | 6.5 | - | 5.6 | - | - | - | - | 3.8 | 6.2 | 1.4 |
| JOB SHARING | 1.1 | 2.0 | 2.2 | - | - | - | - | - | - | - | 3.1 | - |
| CHILD-CARE | - | - | - | - | - | - | - | - | - | - | - | - |

### TABLE 49B

## PERCENTAGE OF COMPANIES OFFERING THE FOLLOWING BENEFITS TO FULL-TIME EMPLOYEES ONLY

| | | GEOGRAPHIC REGION OF HEADQUARTERS | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | ALL COMPANIES | NEW ENGLAND | MIDDLE ATLANTIC | EAST NORTH CENTRAL | WEST NORTH CENTRAL | SOUTH EAST | WEST SOUTH CENTRAL | MOUNTAIN | PACIFIC |
| TOTAL RESPONDENTS | 189 | 15 | 27 | 43 | 19 | 39 | 11 | 13 | 22 |
| LIFE INSURANCE | 52.9% | 73.3% | 25.9% | 60.5% | 52.6% | 66.7% | 72.7% | 38.5% | 31.8% |
| PAID SICK LEAVE | 33.3 | 60.0 | 11.1 | 23.3 | 42.1 | 48.7 | 45.5 | 38.5 | 18.2 |
| PAID HOLIDAYS | 29.1 | 33.3 | 7.4 | 32.6 | 26.3 | 46.2 | 36.4 | 30.8 | 13.6 |
| PAID VACATION | 24.9 | 20.0 | 3.7 | 27.9 | 21.1 | 41.0 | 63.6 | 15.4 | 9.1 |
| RETIREMENT PLANS | 19.6 | 26.7 | 11.1 | 23.3 | 15.8 | 17.9 | 54.5 | 15.4 | 9.1 |
| TUITION REIMBURSEMENT | 19.6 | 26.7 | 14.8 | 18.6 | 31.6 | 23.1 | 9.1 | 23.1 | 9.1 |
| PERSONAL HOLIDAYS | 15.3 | 26.7 | 7.4 | 11.6 | 21.1 | 25.6 | 36.4 | - | - |
| TRANSPORTATION REIMBURSEMENT | 3.7 | 13.3 | - | - | 15.8 | 2.6 | - | 7.7 | - |
| HEALTH-CLUB MEMBERSHIPS | 3.7 | 6.7 | - | 7.0 | - | 5.1 | - | - | 4.5 |
| JOB SHARING | 1.1 | - | - | 2.3 | - | 2.6 | - | - | - |
| CHILD-CARE | - | - | - | - | - | - | - | - | - |

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

## TABLE 50A

## PERCENTAGE OF COMPANIES OFFERING THE FOLLOWING BENEFITS TO BOTH FULL-TIME AND PART-TIME EMPLOYEES

| | | ANNUAL SALES IN MILLIONS | | | | | | | | NUMBER OF STORES | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | ALL COMPANIES | UNDER $10 | $10-$30 | $31-$100 | $101-$250 | $251-$500 | $501-$1 BIL | $1-$3 BILL | OVER $3 BILL | 1 | 2-10 | 11+ |
| TOTAL RESPONDENTS | 189 | 51 | 46 | 20 | 18 | 15 | 25 | 7 | 7 | 52 | 65 | 72 |
| PAID VACATION | 73.5% | 51.0% | 78.3% | 85.0% | 77.8% | 86.7% | 88.0% | 100.0% | 57.1% | 61.5% | 72.3% | 83.3% |
| PAID HOLIDAYS | 62.4 | 37.3 | 60.9 | 65.0 | 66.7 | 93.3 | 80.0 | 100.0 | 71.4 | 46.2 | 58.5 | 77.8 |
| RETIREMENT PLANS | 55.0 | 15.7 | 63.0 | 60.0 | 72.2 | 73.3 | 84.0 | 100.0 | 42.9 | 36.5 | 50.8 | 72.2 |
| PERSONAL HOLIDAYS | 43.4 | 15.7 | 32.6 | 65.0 | 55.6 | 80.0 | 68.0 | 57.1 | 42.9 | 25.0 | 38.5 | 61.1 |
| LIFE INSURANCE | 37.6 | 15.7 | 32.6 | 30.0 | 38.9 | 80.0 | 56.0 | 100.0 | 28.6 | 17.3 | 30.8 | 58.3 |
| PAID SICK LEAVE | 33.9 | 17.6 | 30.4 | 50.0 | 27.8 | 73.3 | 44.0 | 42.9 | 14.3 | 25.0 | 30.8 | 43.1 |
| TUITION REIMBURSEMENT | 15.9 | 2.0 | 15.2 | 15.0 | 33.3 | 26.7 | 20.0 | 28.6 | 28.6 | 3.8 | 16.9 | 23.6 |
| TRANSPORTATION REIMBURSEMENT | 14.3 | 5.9 | 17.4 | 25.0 | 5.6 | 20.0 | 28.0 | - | - | 5.8 | 20.0 | 15.3 |
| HEALTH-CLUB MEMBERSHIPS | 3.2 | - | 6.5 | 5.0 | - | 6.7 | - | - | 14.3 | 1.9 | 4.6 | 2.8 |
| JOB SHARING | 2.6 | 2.0 | 4.3 | - | - | - | 8.0 | - | - | 1.9 | 3.1 | 2.8 |
| CHILD-CARE | 1.6 | - | - | 5.0 | 5.6 | 6.7 | - | - | - | - | 1.5 | 2.8 |

## TABLE 50B

## PERCENTAGE OF COMPANIES OFFERING THE FOLLOWING BENEFITS TO FULL-TIME AND PART-TIME EMPLOYEES

| | | GEOGRAPHIC REGION OF HEADQUARTERS | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | ALL COMPANIES | NEW ENGLAND | MIDDLE ATLANTIC | EAST NORTH CENTRAL | WEST NORTH CENTRAL | SOUTH EAST | WEST SOUTH CENTRAL | MOUNTAIN | PACIFIC |
| TOTAL RESPONDENTS | 189 | 15 | 27 | 43 | 19 | 39 | 11 | 13 | 22 |
| PAID VACATION | 73.5% | 80.0% | 96.3% | 72.1% | 73.7% | 59.0% | 36.4% | 84.6% | 81.8% |
| PAID HOLIDAYS | 62.4 | 66.7 | 92.6 | 55.8 | 63.2 | 43.6 | 45.5 | 61.5 | 77.3 |
| RETIREMENT PLANS | 55.0 | 40.0 | 77.8 | 44.2 | 78.9 | 43.6 | 27.3 | 61.5 | 68.2 |
| PERSONAL HOLIDAYS | 43.4 | 53.3 | 74.1 | 41.9 | 42.1 | 17.9 | 36.4 | 30.8 | 59.1 |
| LIFE INSURANCE | 37.6 | 20.0 | 63.0 | 34.9 | 47.4 | 20.5 | 27.3 | 38.5 | 50.0 |
| PAID SICK LEAVE | 33.9 | 40.0 | 74.1 | 20.9 | 15.8 | 15.4 | 18.2 | 46.2 | 54.5 |
| TUITION REIMBURSEMENT | 15.9 | 20.0 | 22.2 | 11.6 | 5.3 | 12.8 | 18.2 | 7.7 | 31.8 |
| TRANSPORTATION REIMBURSEMENT | 14.3 | - | 14.8 | 18.6 | 15.8 | 15.4 | - | 7.7 | 22.7 |
| HEALTH-CLUB MEMBERSHIPS | 3.2 | - | 7.4 | - | - | - | - | 7.7 | 13.6 |
| JOB SHARING | 2.6 | - | 7.4 | - | - | 5.1 | - | - | 4.5 |
| CHILD-CARE | 1.6 | 6.7 | 3.7 | - | - | 2.6 | - | - | - |

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

## TABLE 51

# PERCENTAGE OF COMPANIES CONSIDERING OFFERING THE FOLLOWING BENEFITS TO:

| | | FULL-TIME EMPLOYEES | FULL-AND PART-TIME EMPLOYEES |
|---|---|---|---|
| | ALL COMPANIES | ALL COMPANIES | ALL COMPANIES |
| TOTAL RESPONDENTS | 189 | 189 | 189 |
| CHILD-CARE | 15.3% | 7.9% | 7.4% |
| RETIREMENT PLANS | 9.5 | 7.9 | 1.6 |
| TUITION REIMBURSEMENT | 4.2 | 2.1 | 2.1 |
| PERSONAL HOLIDAYS | 3.7 | 2.1 | 1.6 |
| TRANSPORTATION REIMBURSEMENT | 2.6 | 1.1 | 1.6 |
| JOB SHARING | 1.6 | 1.1 | .5 |
| PAID VACATION | 1.1 | .5 | .5 |
| PAID SICK LEAVE | 1.1 | 1.1 | - |
| LIFE INSURANCE | 1.1 | .5 | .5 |
| HEALTH-CLUB MEMBERSHIPS | 1.1 | 1.1 | - |
| PAID HOLIDAYS | .5 | - | .5 |

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

## TABLE 52A
# FREQUENCY OF EMPLOYEE PERFORMANCE REVIEWS PER YEAR

| | | ANNUAL SALES IN MILLIONS | | | | | | | | NUMBER OF STORES | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | ALL COMPANIES | UNDER $10 | $10-$30 | $31-$100 | $101-$250 | $251-$500 | $501-$1 BIL | $1-$3 BILL | OVER $3 BILL | 1 | 2-10 | 11+ |
| TOTAL RESPONDENTS | 180 | 48 | 45 | 19 | 17 | 14 | 24 | 7 | 6 | 49 | 63 | 68 |
| ONCE PER YEAR | 50.0% | 47.9% | 35.6% | 68.4% | 52.9% | 50.0% | 66.7% | 28.6% | 66.7% | 46.9% | 46.0% | 55.9% |
| TWO PER YEAR | 35.6 | 37.5 | 46.7 | 26.3 | 29.4 | 35.7 | 29.2 | 28.6 | 16.7 | 38.8 | 41.3 | 27.9 |
| THREE PER YEAR | 1.7 | - | 4.4 | 5.3 | - | - | - | - | - | - | 3.2 | 1.5 |
| OTHER NUMBER PER YEAR | 6.1 | 8.3 | 8.9 | - | 5.9 | 7.1 | - | - | 16.7 | 10.2 | 4.8 | 4.4 |
| NO FORMAL EVALUATIONS | 4.4 | 2.1 | 4.4 | - | 11.8 | 7.1 | - | 28.6 | - | - | 4.8 | 7.4 |
| BY CONTRACT | 1.1 | 2.1 | - | - | - | - | - | 14.3 | - | 2.0 | - | 1.5 |
| DEPENDS ON INDIVIDUAL AND JOB | .6 | 2.1 | - | - | - | - | - | - | - | 2.0 | - | - |
| OTHER | .6 | - | - | - | - | - | 4.2 | - | - | - | - | 1.5 |

## TABLE 52B
# FREQUENCY OF EMPLOYEE PERFORMANCE REVIEWS PER YEAR

| | | GEOGRAPHIC REGION OF HEADQUARTERS | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | ALL COMPANIES | NEW ENGLAND | MIDDLE ATLANTIC | EAST NORTH CENTRAL | WEST NORTH CENTRAL | SOUTH EAST | WEST SOUTH CENTRAL | MOUNTAIN | PACIFIC |
| TOTAL RESPONDENTS | 180 | 14 | 25 | 42 | 17 | 37 | 11 | 13 | 21 |
| ONCE PER YEAR | 50.0% | 42.9% | 56.0% | 35.7% | 64.7% | 56.8% | 36.4% | 61.5% | 52.4% |
| TWO PER YEAR | 35.6 | 57.1 | 32.0 | 45.2 | 29.4 | 32.4 | 45.5 | 23.1 | 19.0 |
| THREE PER YEAR | 1.7 | - | - | 2.4 | - | - | 9.1 | - | 4.8 |
| OTHER NUMBER PER YEAR | 6.1 | - | - | 9.5 | 5.9 | 8.1 | 9.1 | 7.7 | 4.8 |
| NO FORMAL EVALUATIONS | 4.4 | - | 12.0 | 2.4 | - | 2.7 | - | - | 14.3 |
| BY CONTRACT | 1.1 | - | - | 2.4 | - | - | - | 7.7 | - |
| DEPENDS ON INDIVIDUAL AND JOB | .6 | - | - | 2.4 | - | - | - | - | - |
| OTHER | .6 | - | - | - | - | - | - | - | 4.8 |

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

## TABLE 53A
## PERCENTAGE OF RESPONDENTS WHO WOULD CONSIDER IT VALUABLE TO INCREASE THE FREQUENCY OF REVIEWS

| | | ANNUAL SALES IN MILLIONS | | | | | | | | NUMBER OF STORES | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | ALL COMPANIES | UNDER $10 | $10-$30 | $31-$100 | $101-$250 | $251-$500 | $501-$1 BIL | $1-$3 BILL | OVER $3 BILL | 1 | 2-10 | 11+ |
| TOTAL RESPONDENTS | 178 | 46 | 45 | 18 | 16 | 15 | 24 | 7 | 7 | 47 | 62 | 69 |
| PERCENTAGE CONSIDERING IT VALUABLE TO INCREASE FREQUENCY OF REVIEWS | 40.4% | 52.2% | 28.9% | 44.4% | 25.0% | 46.7% | 37.5% | 57.1% | 42.9% | 46.8% | 37.1% | 39.1% |

## TABLE 53B
## PERCENTAGE OF RESPONDENTS WHO WOULD CONSIDER IT VALUABLE TO INCREASE THE FREQUENCY OF REVIEWS

| | | GEOGRAPHIC REGION OF HEADQUARTERS | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | ALL COMPANIES | NEW ENGLAND | MIDDLE ATLANTIC | EAST NORTH CENTRAL | WEST NORTH CENTRAL | SOUTH EAST | WEST SOUTH CENTRAL | MOUNTAIN | PACIFIC |
| TOTAL RESPONDENTS | 178 | 14 | 26 | 41 | 17 | 38 | 11 | 11 | 20 |
| PERCENTAGE CONSIDERING IT VALUABLE TO INCREASE FREQUENCY OF REVIEWS | 40.4% | 21.4% | 50.0% | 24.4% | 52.9% | 44.7% | 18.2% | 45.5% | 65.0% |

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

## TABLE 54A
# PERCENTAGE OF COMPANIES WITH THE FOLLOWING PROGRAMS:

| | | ANNUAL SALES IN MILLIONS | | | | | | | | NUMBER OF STORES | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | ALL COMPANIES | UNDER $10 | $10-$30 | $31-$100 | $101-$250 | $251-$500 | $501-$1 BIL | $1-$3 BILL | OVER $3 BILL | 1 | 2-10 | 11+ |
| TOTAL RESPONDENTS | 186 | 51 | 43 | 20 | 18 | 15 | 25 | 7 | 7 | 52 | 62 | 72 |
| PERCENTAGE OF COMPANIES WITH ASSOCIATIONS OR SPECIAL SOCIAL FUNCTIONS | 60.2% | 62.7% | 55.8% | 65.0% | 77.8% | 53.3% | 52.0% | 28.6% | 85.7% | 63.5% | 64.5% | 54.2% |
| TOTAL RESPONDENTS | 177 | 47 | 43 | 18 | 17 | 14 | 25 | 6 | 7 | 50 | 58 | 69 |
| PERCENTAGE OF COMPANIES THAT PROVIDE OUTSTANDING EMPLOYEES WITH SPECIAL RECOGNITION | 74.0% | 70.2% | 72.1% | 66.7% | 64.7% | 71.4% | 92.0% | 100% | 71.4% | 76.0% | 67.2% | 78.3% |
| PERCENTAGE PROVIDING MONETARY AWARDS WITH SUCH RECOGNITION | 56.5 | 61.7 | 62.8 | 55.6 | 64.7 | 42.9 | 44.0 | 33.3 | 57.1 | 68.0 | 56.9 | 47.8 |
| TOTAL RESPONDENTS | 182 | 49 | 44 | 20 | 17 | 15 | 24 | 7 | 6 | 51 | 62 | 69 |
| PERCENTAGE OF COMPANIES RECOGNIZING OUTSTANDING PUBLIC SERVICE BY EMPLOYEES | 53.3% | 42.9% | 50.0% | 50.0% | 52.9% | 33.3% | 79.2% | 85.7% | 83.3% | 52.9% | 43.5% | 62.3% |
| TOTAL RESPONDENTS | 189 | 51 | 46 | 20 | 18 | 15 | 25 | 7 | 7 | 52 | 65 | 72 |
| PERCENTAGE OFFERING PROFIT SHARING TO NON-MANAGEMENT EMPLOYEES | 50.8% | 29.4% | 69.6% | 55.0% | 72.2% | 46.7% | 48.0% | 28.6% | 57.1% | 46.2% | 52.3% | 52.8% |

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

TABLE 54B

# PERCENTAGE OF COMPANIES WITH THE FOLLOWING PROGRAMS:

|  |  | GEOGRAPHIC REGION OF HEADQUARTERS |  |  |  |  |  |  |  |
|---|---|---|---|---|---|---|---|---|---|
|  | ALL COMPANIES | NEW ENGLAND | MIDDLE ATLANTIC | EAST NORTH CENTRAL | WEST NORTH CENTRAL | SOUTH EAST | WEST SOUTH CENTRAL | MOUNTAIN | PACIFIC |
| TOTAL RESPONDENTS | 186 | 15 | 27 | 42 | 19 | 39 | 10 | 13 | 21 |
| COMPANIES WITH ASSOCIATIONS OR SPECIAL SOCIAL FUNCTIONS | 60.2% | 60.0% | 66.7% | 66.7% | 42.1% | 71.8% | 40.0% | 38.5% | 57.1% |
| TOTAL RESPONDENTS | 177 | 11 | 27 | 38 | 19 | 38 | 11 | 13 | 20 |
| PERCENTAGE OF COMPANIES THAT PROVIDE OUTSTANDING EMPLOYEES WITH SPECIAL RECOGNITION | 74.0% | 100.0% | 85.2% | 78.9% | 52.6% | 65.8% | 63.6% | 69.2% | 80.0% |
| PERCENTAGE PROVIDING MONETARY AWARDS WITH SUCH RECOGNITION | 56.5 | 81.8 | 63.0 | 68.4 | 36.8 | 52.6 | 36.4 | 46.2 | 55.0 |
| TOTAL RESPONDENTS | 182 | 15 | 25 | 42 | 17 | 37 | 11 | 13 | 22 |
| PERCENTAGE OF COMPANIES RECOGNIZING OUTSTANDING PUBLIC SERVICE BY EMPLOYEES | 53.3% | 40.0% | 64.0% | 52.4% | 58.8% | 51.4% | 54.5% | 53.8% | 50.0% |
| TOTAL RESPONDENTS | 189 | 15 | 27 | 43 | 19 | 39 | 11 | 13 | 22 |
| PERCENTAGE OFFERING PROFIT SHARING TO NON-MANAGEMENT EMPLOYEES | 50.8% | 40.0% | 37.0% | 53.5% | 68.4% | 51.3% | 72.7% | 46.2% | 45.5% |

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

**TABLE 55A**

## PERCENTAGE OF COMPANIES OFFERING "PAY-FOR-KNOWLEDGE" PROGRAMS

| | ALL COMPANIES | ANNUAL SALES IN MILLIONS | | | | | | | | NUMBER OF STORES | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | UNDER $10 | $10-$30 | $31-$100 | $101-$250 | $251-$500 | $501-$1 BIL | $1-$3 BILL | OVER $3 BILL | 1 | 2-10 | 11+ |
| TOTAL RESPONDENTS | 186 | 50 | 45 | 20 | 18 | 15 | 25 | 7 | 6 | 51 | 64 | 71 |
| PERCENTAGE OF COMPANIES OFFERING "PAY-FOR-KNOWLEDGE" PROGRAMS | 9.1% | 18.0% | 8.9% | - | - | 6.7% | 4.0% | 14.3% | 16.7% | 15.7% | 7.8% | 5.6% |
| PERCENTAGE OF COMPANIES PLANNING TO IMPLEMENT SUCH PROGRAMS IN THE FUTURE | 4.3 | 2.0 | 4.4 | 10.0 | - | - | 8.0 | - | 16.7 | 3.9 | 6.3 | 2.8 |

**TABLE 55B**

## PERCENTAGE OF COMPANIES OFFERING "PAY-FOR-KNOWLEDGE" PROGRAMS

| | ALL COMPANIES | GEOGRAPHIC REGION OF HEADQUARTERS | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | | NEW ENGLAND | MIDDLE ATLANTIC | EAST NORTH CENTRAL | WEST NORTH CENTRAL | SOUTH EAST | WEST SOUTH CENTRAL | MOUNTAIN | PACIFIC |
| TOTAL RESPONDENTS | 186 | 15 | 26 | 43 | 18 | 38 | 11 | 13 | 22 |
| PERCENTAGE OF COMPANIES OFFERING "PAY-FOR-KNOWLEDGE" PROGRAMS | 9.1% | - | 11.5% | 11.6% | 22.2% | 5.3% | - | 7.7% | 9.1% |
| PERCENTAGE OF COMPANIES PLANNING TO IMPLEMENT SUCH PROGRAMS IN THE FUTURE | 4.3 | - | 3.8 | 2.3 | 11.1 | 5.3 | - | 7.7 | 4.5 |

* A PROGRAM IN WHICH EMPLOYEES ARE PAID EXTRA FOR ADDITIONAL SKILLS LEARNED BEYOND THOSE IN THE JOB FOR WHICH THEY WERE INITIALLY HIRED

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

## TABLE 56A

## PERCENTAGE OF COMPANIES WITH EMPLOYEES ACTIVELY INVOLVED WITH PROBLEM SOLVING AT THE STORE LEVEL

| | ALL COMPANIES | ANNUAL SALES IN MILLIONS | | | | | | | | NUMBER OF STORES | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | UNDER $10 | $10-$30 | $31-$100 | $101-$250 | $251-$500 | $501-$1 BIL | $1-$3 BILL | OVER $3 BILL | 1 | 2-10 | 11+ |
| TOTAL RESPONDENTS | 186 | 49 | 46 | 19 | 18 | 15 | 25 | 7 | 7 | 51 | 63 | 72 |
| PERCENTAGE OF COMPANIES WITH EMPLOYEES ACTIVELY INVOLVED IN PROBLEM SOLVING AT THE STORE LEVEL | 73.1% | 79.6% | 82.6% | 42.1% | 72.2% | 66.7% | 68.0% | 71.4% | 85.7% | 82.4% | 71.4% | 68.1% |

## TABLE 56B

## PERCENTAGE OF COMPANIES WITH EMPLOYEES ACTIVELY INVOLVED WITH PROBLEM SOLVING AT THE STORE LEVEL

| | ALL COMPANIES | GEOGRAPHIC REGION OF HEADQUARTERS | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | | NEW ENGLAND | MIDDLE ATLANTIC | EAST NORTH CENTRAL | WEST NORTH CENTRAL | SOUTH EAST | WEST SOUTH CENTRAL | MOUNTAIN | PACIFIC |
| TOTAL RESPONDENTS | 186 | 15 | 26 | 43 | 19 | 38 | 11 | 13 | 21 |
| PERCENTAGE OF COMPANIES WITH EMPLOYEES ACTIVELY INVOLVED IN PROBLEM SOLVING AT THE STORE LEVEL | 73.1% | 66.7% | 84.6% | 74.4% | 68.4% | 76.3% | 63.6% | 92.3% | 52.4% |

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

## TABLE 57A
## PERCENTAGE OF COMPANIES WHO HAVE EXPERIMENTED WITH SELF-DIRECTED WORK GROUPS

| | | ANNUAL SALES IN MILLIONS | | | | | | | | NUMBER OF STORES | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | ALL COMPANIES | UNDER $10 | $10-$30 | $31-$100 | $101-$250 | $251-$500 | $501-$1 BIL | $1-$3 BILL | OVER $3 BILL | 1 | 2-10 | 11+ |
| TOTAL RESPONDENTS | 179 | 47 | 44 | 19 | 18 | 15 | 25 | 6 | 5 | 49 | 61 | 69 |
| PERCENTAGE OF COMPANIES WHO HAVE EXPERIMENTED WITH SELF-DIRECTED WORK GROUPS | 17.3% | 4.3% | 13.6% | 15.8% | 38.9% | 20.0% | 28.0% | 16.7% | 40.0% | 2.0% | 19.7% | 26.1% |

## TABLE 57B
## PERCENTAGE OF COMPANIES WHO HAVE EXPERIMENTED WITH SELF-DIRECTED WORK GROUPS

| | | GEOGRAPHIC REGION OF HEADQUARTERS | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | ALL COMPANIES | NEW ENGLAND | MIDDLE ATLANTIC | EAST NORTH CENTRAL | WEST NORTH CENTRAL | SOUTH EAST | WEST SOUTH CENTRAL | MOUNTAIN | PACIFIC |
| TOTAL RESPONDENTS | 179 | 14 | 24 | 42 | 18 | 38 | 11 | 12 | 20 |
| PERCENTAGE OF COMPANIES WHO HAVE EXPERIMENTED WITH SELF-DIRECTED WORK GROUPS | 17.3% | 14.3% | 20.8% | 11.9% | 22.2% | 15.8% | 9.1% | 25.0% | 25.0% |

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

## TABLE 58A
## PERCENTAGE OF COMPANIES WHO CONDUCTED AN EMPLOYEE ATTITUDE SURVEY IN THE PAST THREE YEARS

| | | ANNUAL SALES IN MILLIONS | | | | | | | | NUMBER OF STORES | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | ALL COMPANIES | UNDER $10 | $10-$30 | $31-$100 | $101-$250 | $251-$500 | $501-$1 BIL | $1-$3 BILL | OVER $3 BILL | 1 | 2-10 | 11+ |
| TOTAL RESPONDENTS | 187 | 51 | 45 | 20 | 18 | 15 | 25 | 7 | 6 | 51 | 65 | 71 |
| PERCENTAGE OF COMPANIES WHO CONDUCTED AN EMPLOYEE ATTITUDE SURVEY IN THE PAST THREE YEARS | 39.0% | 23.5% | 33.3% | 30.0% | 50.0% | 53.3% | 52.0% | 71.4% | 83.3% | 21.6% | 35.4% | 54.9% |

## TABLE 58B
## PERCENTAGE OF COMPANIES WHO CONDUCTED AN EMPLOYEE ATTITUDE SURVEY IN THE PAST THREE YEARS

| | | GEOGRAPHIC REGION OF HEADQUARTERS | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | ALL COMPANIES | NEW ENGLAND | MIDDLE ATLANTIC | EAST NORTH CENTRAL | WEST NORTH CENTRAL | SOUTH EAST | WEST SOUTH CENTRAL | MOUNTAIN | PACIFIC |
| TOTAL RESPONDENTS | 187 | 15 | 26 | 43 | 19 | 38 | 11 | 13 | 22 |
| PERCENTAGE OF COMPANIES WHO CONDUCTED AN EMPLOYEE ATTITUDE SURVEY IN THE PAST THREE YEARS | 39.0% | 33.3% | 30.8% | 32.6% | 31.6% | 50.0% | 45.5% | 30.8% | 54.5% |

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

## TABLE 59A
# PERCENTAGE OF COMPANIES CONDUCTING EXIT INTERVIEWS WITH DEPARTING EMPLOYEES

| | | ANNUAL SALES IN MILLIONS | | | | | | | | NUMBER OF STORES | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | ALL COMPANIES | UNDER $10 | $10-$30 | $31-$100 | $101-$250 | $251-$500 | $501-$1 BIL | $1-$3 BILL | OVER $3 BILL | 1 | 2-10 | 11+ |
| TOTAL RESPONDENTS | 189 | 51 | 46 | 20 | 18 | 15 | 25 | 7 | 7 | 52 | 65 | 72 |
| PERCENTAGE OF COMPANIES CONDUCTING EXIT INTERVIEWS WITH DEPARTING EMPLOYEES | 67.7% | 54.9% | 63.0% | 70.0% | 72.2% | 73.3% | 80.0% | 100% | 85.7% | 63.5% | 64.6% | 73.6% |

## TABLE 59B
# PERCENTAGE OF COMPANIES CONDUCTING EXIT INTERVIEWS WITH DEPARTING EMPLOYEES

| | | GEOGRAPHIC REGION OF HEADQUARTERS | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | ALL COMPANIES | NEW ENGLAND | MIDDLE ATLANTIC | EAST NORTH CENTRAL | WEST NORTH CENTRAL | SOUTH EAST | WEST SOUTH CENTRAL | MOUNTAIN | PACIFIC |
| TOTAL RESPONDENTS | 189 | 15 | 27 | 43 | 19 | 39 | 11 | 13 | 22 |
| PERCENTAGE OF COMPANIES CONDUCTING EXIT INTERVIEWS WITH DEPARTING EMPLOYEES | 67.7% | 73.3% | 74.1% | 72.1% | 68.4% | 56.4% | 54.5% | 84.6% | 63.6% |

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

## TABLE 60A
## PERCENTAGE OF COMPANIES USING THE RESULTS OF EMPLOYEE ATTITUDE SURVEYS AND/OR EXIT INTERVIEWS AS A PART OF STRATEGIC PLANNING

| | | ANNUAL SALES IN MILLIONS | | | | | | | | NUMBER OF STORES | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | ALL COMPANIES | UNDER $10 | $10-$30 | $31-$100 | $101-$250 | $251-$500 | $501-$1 BIL | $1-$3 BILL | OVER $3 BILL | 1 | 2-10 | 11+ |
| TOTAL RESPONDENTS | 142 | 32 | 33 | 18 | 13 | 12 | 20 | 7 | 7 | 38 | 48 | 56 |
| PERCENTAGE OF COMPANIES USING THE RESULTS OF EMPLOYEE ATTITUDE SURVEYS AND/OR EXIT INTERVIEWS AS A PART OF STRATEGIC PLANNING | 81.7% | 78.1% | 84.8% | 83.3% | 84.6% | 75.0% | 85.0% | 71.4% | 85.7% | 76.3% | 87.5% | 80.4% |

## TABLE 60B
## PERCENTAGE OF COMPANIES USING THE RESULTS OF EMPLOYEE ATTITUDE SURVEYS AND/OR EXIT INTERVIEWS AS A PART OF STRATEGIC PLANNING

| | | GEOGRAPHIC REGION OF HEADQUARTERS | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | ALL COMPANIES | NEW ENGLAND | MIDDLE ATLANTIC | EAST NORTH CENTRAL | WEST NORTH CENTRAL | SOUTH EAST | WEST SOUTH CENTRAL | MOUNTAIN | PACIFIC |
| TOTAL RESPONDENTS | 142 | 13 | 20 | 32 | 14 | 28 | 7 | 11 | 17 |
| PERCENTAGE OF COMPANIES USING THE RESULTS OF EMPLOYEE ATTITUDE SURVEYS AND/OR EXIT INTERVIEWS AS A PART OF STRATEGIC PLANNING | 81.7% | 69.2% | 85.0% | 87.5% | 85.7% | 75.0% | 57.1% | 81.8% | 94.1% |

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

TABLE 61

## PERCENTAGE OF STORE MANAGERS ARE: —AVERAGES

| | ALL COMPANIES | ANNUAL SALES IN MILLIONS<br>UNDER $500 | $501- $1 BILL | $1 - $3 BILL | OVER $3 BILL | NUMBER OF STORES<br>1-50 | 51-100 | 101 + |
|---|---|---|---|---|---|---|---|---|
| TOTAL RESPONDENTS | 60 | 24 | 22 | 8 | 6 | 28 | 16 | 16 |
| MALE | 94.9% | 94.2% | 95.2% | 95.7% | 95.3% | 94.3% | 95.4% | 95.3% |
| FEMALE | 5.1 | 5.8 | 4.8 | 4.3 | 4.7 | 5.7 | 4.6 | 4.7 |

TABLE 62

## HIGHEST EDUCATIONAL LEVEL REACHED, PERCENTAGE OF STORE MANAGERS ARE: —AVERAGES

| | ALL COMPANIES | ANNUAL SALES IN MILLIONS<br>UNDER $500 | $501- $1 BILL | $1 - $3 BILL | OVER $3 BILL | NUMBER OF STORES<br>1-50 | 51-100 | 101 + |
|---|---|---|---|---|---|---|---|---|
| TOTAL RESPONDENTS | 60 | 24 | 22 | 8 | 6 | 28 | 16 | 16 |
| HIGH SCHOOL DIPLOMA | 69.4% | 77.2% | 67.0% | 62.1% | 54.6% | 75.7% | 67.8% | 58.9% |
| ASSOCIATES DEGREE | 13.1 | 8.6 | 12.8 | 14.9 | 31.4 | 10.0 | 12.2 | 20.1 |
| BACHELORS DEGREE | 14.8 | 12.7 | 17.9 | 16.3 | 11.0 | 11.9 | 17.1 | 17.9 |
| GRADUATE DEGREE | 1.1 | .5 | .9 | 2.5 | 2.0 | .6 | 1.1 | 2.0 |
| NO HIGH SCHOOL DIPLOMA | 1.6 | 1.0 | 1.4 | 4.3 | 1.0 | 1.8 | 1.8 | 1.1 |

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

## TABLE 63

## EXPECTED HIGHEST EDUCATIONAL LEVEL IN 1993, PERCENTAGE OF STORE MANAGERS WILL BE: --AVERAGES

| | ALL COMPANIES | ANNUAL SALES IN MILLIONS<br>UNDER $500 | <br>$501- $1 BILL | <br>$1 - $3 BILL | <br>OVER $3 BILL | NUMBER OF STORES<br>1-50 | <br>51-100 | <br>101 + |
|---|---|---|---|---|---|---|---|---|
| TOTAL RESPONDENTS | 60 | 24 | 22 | 8 | 6 | 28 | 16 | 16 |
| HIGH SCHOOL DIPLOMA | 54.6% | 62.5% | 51.3% | 52.1% | 38.3% | 63.2% | 49.3% | 43.0% |
| ASSOCIATES DEGREE | 18.4 | 13.3 | 20.3 | 18.3 | 31.2 | 14.8 | 19.0 | 24.8 |
| BACHELORS DEGREE | 24.8 | 23.7 | 26.7 | 21.1 | 27.5 | 21.1 | 27.6 | 29.2 |
| GRADUATE DEGREE | 1.6 | 0 | 1.5 | 5.9 | 3.0 | .2 | 3.4 | 2.5 |
| NO HIGH SCHOOL DIPLOMA | .6 | .5 | .3 | 2.6 | 0 | .7 | .7 | .5 |

## TABLE 64

## PERCENTAGE OF STORE MANAGERS IN THE FOLLOWING AGE GROUPS --AVERAGES

| | ALL COMPANIES | ANNUAL SALES IN MILLIONS<br>UNDER $500 | <br>$501- $1 BILL | <br>$1 - $3 BILL | <br>OVER $3 BILL | NUMBER OF STORES<br>1-50 | <br>51-100 | <br>101 + |
|---|---|---|---|---|---|---|---|---|
| TOTAL RESPONDENTS | 60 | 24 | 22 | 8 | 6 | 28 | 16 | 16 |
| 20 TO 30 | 16.4% | 19.5% | 14.4% | 12.9% | 16.5% | 16.6% | 14.9% | 17.9% |
| 31 TO 40 | 48.2 | 46.3 | 50.8 | 49.5 | 45.3 | 52.6 | 44.7 | 43.9 |
| 41 TO 50 | 25.2 | 24.2 | 25.1 | 26.9 | 27.3 | 22.4 | 28.8 | 26.7 |
| 51 + | 10.1 | 10.0 | 9.7 | 10.7 | 10.8 | 8.4 | 11.7 | 11.4 |

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

TABLE 65

## PERCENTAGE OF STORE MANAGERS WHO HAVE BEEN IN THEIR PRESENT POSITION FOR: –AVERAGES

| | | ANNUAL SALES IN MILLIONS | | | | NUMBER OF STORES | | |
|---|---|---|---|---|---|---|---|---|
| | ALL COMPANIES | UNDER $500 | $501- $1 BILL | $1 - $3 BILL | OVER $3 BILL | 1-50 | 51- 100 | 101 + |
| TOTAL RESPONDENTS | 60 | 24 | 22 | 8 | 6 | 28 | 16 | 16 |
| 1 - 5 YEARS | 36.3% | 38.1% | 35.2% | 36.6% | 31.8% | 39.8% | 30.7% | 35.5% |
| 6 - 10 YEARS | 29.2 | 29.7 | 29.6 | 32.0 | 20.8 | 32.1 | 28.1 | 24.6 |
| 11 - 15 YEARS | 19.6 | 20.9 | 19.3 | 14.8 | 23.4 | 18.7 | 21.3 | 19.7 |
| 16 - 20 YEARS | 8.5 | 5.6 | 9.9 | 9.6 | 14.0 | 4.3 | 12.9 | 12.0 |
| 21 YEARS + | 6.4 | 5.7 | 5.9 | 7.0 | 10.0 | 5.1 | 6.9 | 8.1 |

TABLE 66

## PERCENTAGE OF STORE MANAGERS WHO HAVE LEFT THE COMPANY IN THE PAST TWELVE MONTHS –AVERAGES

| | | ANNUAL SALES IN MILLIONS | | | | NUMBER OF STORES | | |
|---|---|---|---|---|---|---|---|---|
| | ALL COMPANIES | UNDER $500 | $501- $1 BILL | $1 - $3 BILL | OVER $3 BILL | 1-50 | 51- 100 | 101 + |
| TOTAL RESPONDENTS | 59 | 24 | 21 | 8 | 6 | 28 | 16 | 15 |
| PERCENTAGE OF STORE MANAGERS WHO HAVE LEFT THE COMPANY IN THE PAST TWELVE MONTHS | 6.1% | 6.5% | 5.5% | 5.4% | 7.8% | 7.3% | 4.2% | 6.1% |

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

## TABLE 67
## PERCENTAGE OF STORE MANAGERS WHO HAVE LEFT THE INDUSTRY --AVERAGES

| | | ANNUAL SALES IN MILLIONS | | | | NUMBER OF STORES | | |
|---|---|---|---|---|---|---|---|---|
| | ALL COMPANIES | UNDER $500 | $501- $1 BILL | $1 - $3 BILL | OVER $3 BILL | 1-50 | 51-100 | 101 + |
| TOTAL RESPONDENTS | 50 | 20 | 19 | 7 | 4 | 25 | 13 | 12 |
| PERCENTAGE OF STORE MANAGERS WHO HAVE LEFT THE INDUSTRY | 20.7% | 16.8% | 21.4% | 20.7% | 36.7% | 17.6% | 24.2% | 23.2% |

## TABLE 68
## PERCENTAGE OF STORE MANAGERS WHO HAVE STEPPED DOWN FROM A MANAGEMENT POSITION IN THE PAST TWELVE MONTHS --AVERAGES

| | | ANNUAL SALES IN MILLIONS | | | | NUMBER OF STORES | | |
|---|---|---|---|---|---|---|---|---|
| | ALL COMPANIES | UNDER $500 | $501- $1 BILL | $1 - $3 BILL | OVER $3 BILL | 1-50 | 51-100 | 101 + |
| TOTAL RESPONDENTS | 57 | 24 | 21 | 8 | 4 | 28 | 16 | 13 |
| PERCENTAGE OF STORE MANAGERS WHO HAVE STEPPED DOWN FROM A MANAGEMENT POSITION IN THE PAST TWELVE MONTHS | 2.1% | 1.1% | 2.2% | 3.3% | 5.3% | 1.6% | 1.4% | 4.0% |

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

## TABLE 69

## PERCENTAGE OF STORE MANAGERS WHO HAVE MOVED INTO THE FOLLOWING POSITIONS IN THE PAST TWELVE MONTHS --AVERAGES

| | | ANNUAL SALES IN MILLIONS | | | | NUMBER OF STORES | | |
|---|---|---|---|---|---|---|---|---|
| | ALL COMPANIES | UNDER $500 | $501- $1 BILL | $1 - $3 BILL | OVER $3 BILL | 1-50 | 51- 100 | 101 + |
| TOTAL RESPONDENTS | 57 | 24 | 21 | 8 | 4 | 28 | 16 | 13 |
| DISTRICT MANAGER | 1.8% | 1.5% | 2.0% | 2.5% | 1.0% | 1.4% | 1.0% | 3.7% |
| MERCHANDISER | 1.3 | 1.2 | 1.4 | 1.8 | .5 | 1.0 | 1.1 | 2.2 |
| OTHER HEADQUARTERS PROMOTION | 1.1 | .1 | 1.8 | 2.6 | .5 | 1.0 | 1.0 | 1.5 |
| LATERAL MOVE TO HEADQUARTERS | 2.8 | 4.9 | 1.4 | 1.4 | .5 | 4.5 | .5 | 2.1 |

## TABLE 70

## PERCENTAGE OF STORE MANAGERS THAT CAME FROM THE FOLLOWING PLACES: --AVERAGES

| | | ANNUAL SALES IN MILLIONS | | | | NUMBER OF STORES | | |
|---|---|---|---|---|---|---|---|---|
| | ALL COMPANIES | UNDER $500 | $501- $1 BILL | $1 - $3 BILL | OVER $3 BILL | 1-50 | 51- 100 | 101 + |
| TOTAL RESPONDENTS | 60 | 24 | 22 | 8 | 6 | 28 | 16 | 16 |
| TRADITIONAL "UP THE RANKS" ROUTE | 84.3% | 87.3% | 81.3% | 80.0% | 88.8% | 83.7% | 86.6% | 83.1% |
| COLLEGE INTO A MANAGEMENT TRAINING PROGRAM | 4.6 | 2.4 | 6.3 | 4.4 | 7.7 | 2.7 | 4.9 | 7.9 |
| MANAGEMENT JOBS IN INDUSTRIES OUTSIDE FOOD RETAILING | 1.6 | 1.2 | 1.4 | 3.8 | .8 | 1.3 | 1.3 | 2.4 |
| OTHER RETAILING CHAINS | 9.4 | 9.1 | 10.8 | 11.9 | 2.7 | 12.3 | 7.1 | 6.6 |

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

### TABLE 71

# EXPECTED PERCENTAGE OF MANAGERS WHO WILL COME FROM THE FOLLOWING PLACES IN 1993: —AVERAGES

| | | ANNUAL SALES IN MILLIONS | | | | NUMBER OF STORES | | |
|---|---|---|---|---|---|---|---|---|
| | ALL COMPANIES | UNDER $500 | $501- $1 BILL | $1 - $3 BILL | OVER $3 BILL | 1-50 | 51- 100 | 101 + |
| TOTAL RESPONDENTS | 60 | 24 | 22 | 8 | 6 | 28 | 16 | 16 |
| TRADITIONAL "UP THE RANKS" ROUTE | 77.8% | 82.8% | 74.4% | 66.9% | 84.8% | 81.0% | 72.9% | 77.1% |
| COLLEGE INTO A MANAGEMENT TRAINING PROGRAM | 12.6 | 8.3 | 15.9 | 18.1 | 11.0 | 9.5 | 18.5 | 12.5 |
| MANAGEMENT JOBS IN INDUSTRIES OUTSIDE FOOD RETAILING | 2.6 | 2.7 | 2.0 | 5.4 | .8 | 2.1 | 3.5 | 2.7 |
| OTHER RETAILING CHAINS | 6.9 | 6.2 | 7.7 | 9.6 | 3.3 | 7.4 | 5.1 | 7.8 |

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

## TABLE 72
# METHODS USED TO SELECT STORE MANAGERS

| | | ANNUAL SALES IN MILLIONS | | | | NUMBER OF STORES | | |
|---|---|---|---|---|---|---|---|---|
| | ALL COMPANIES | UNDER $500 | $501- $1 BILL | $1 - $3 BILL | OVER $3 BILL | 1-50 | 51- 100 | 101 + |
| TOTAL RESPONDENTS | 60 | 24 | 22 | 8 | 6 | 28 | 16 | 16 |
| APPLICATION BLANKS | 50.0% | 66.7% | 50.0% | 25.0% | 16.7% | 60.7% | 50.0% | 31.3% |
| PSYCHOLOGICAL TESTS | 30.0 | 20.8 | 27.3 | 62.5 | 33.3 | 32.1 | 25.0 | 31.3 |
| PERFORMANCE TESTS | 41.7 | 45.8 | 31.8 | 37.5 | 66.7 | 50.0 | 25.0 | 43.8 |
| INTERVIEWS | 80.0 | 79.2 | 81.8 | 87.5 | 66.7 | 78.6 | 75.0 | 87.5 |
| MEDICAL EXAMINATIONS | 8.3 | 4.2 | 4.5 | 25.0 | 16.7 | 3.6 | 12.5 | 12.5 |
| DRUG TESTING | 8.3 | - | 9.1 | 25.0 | 16.7 | 3.6 | 12.5 | 12.5 |
| OTHER | | | | | | | | |
| ASSESSMENT CENTER | 10.0 | - | 4.5 | 37.5 | 33.3 | 3.6 | 12.5 | 18.8 |
| HONESTY TEST | 1.7 | 4.2 | - | - | - | 3.6 | - | - |
| ON THE JOB TRAINING | 5.0 | 8.3 | 4.5 | - | - | 7.1 | - | 6.3 |
| REFERENCE CHECKS | 5.0 | 8.3 | 4.5 | - | - | 7.1 | 6.3 | - |
| VISITS TO THE STORE WHICH THEY MANAGE | 1.7 | 4.2 | - | - | - | 3.6 | - | - |
| PEER/SUPERVISOR RECOMMENDATIONS | 8.3 | 4.2 | 18.2 | - | - | 3.6 | 18.8 | 6.3 |
| EVALUATIONS BY STORE OPERATIONS DEPARTMENT | 3.3 | 4.2 | 4.5 | - | - | 3.6 | - | 6.3 |
| PROGRESS REVIEWS | 1.7 | - | 4.5 | - | - | - | 6.3 | - |
| RESUMES | 3.3 | 4.2 | 4.5 | - | - | 3.6 | 6.3 | - |
| COMPLETION OF MANAGEMENT TRAINING CHECKLISTS | 1.7 | - | - | 12.5 | - | - | 6.3 | - |

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

## TABLE 73

# AVERAGE NUMBER OF YEARS TO BECOME A STORE MANAGER —AVERAGES

| | | ANNUAL SALES IN MILLIONS | | | | NUMBER OF STORES | | |
|---|---|---|---|---|---|---|---|---|
| | ALL COMPANIES | UNDER $500 | $501- $1 BILL | $1 - $3 BILL | OVER $3 BILL | 1-50 | 51- 100 | 101 + |
| TOTAL RESPONDENTS | 56 | 22 | 20 | 8 | 6 | 26 | 14 | 16 |
| AVERAGE NUMBER OF YEARS TO BECOME A STORE MANAGER | 4.7 | 4.1 | 4.8 | 4.6 | 6.3 | 3.8 | 5.2 | 5.5 |

## TABLE 74

# PERCENTAGE OF COMPANIES WITH A FORMAL EDUCATION PROGRAM FOR CURRENT STORE MANAGERS

| | | ANNUAL SALES IN MILLIONS | | | | NUMBER OF STORES | | |
|---|---|---|---|---|---|---|---|---|
| | ALL COMPANIES | UNDER $500 | $501- $1 BILL | $1 - $3 BILL | OVER $3 BILL | 1-50 | 51- 100 | 101 + |
| TOTAL RESPONDENTS | 60 | 24 | 22 | 8 | 6 | 28 | 16 | 16 |
| PERCENTAGE OF COMPANIES WITH A FORMAL EDUCATION PROGRAM FOR CURRENT STORE MANAGERS | 45.0% | 25.0% | 59.1% | 50.0% | 66.7% | 35.7% | 43.8% | 62.5% |

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

### TABLE 75

## TOPICS FOR THE FORMAL EDUCATION PROGRAM

| | | ANNUAL SALES IN MILLIONS | | | | NUMBER OF STORES | | |
|---|---|---|---|---|---|---|---|---|
| | ALL COMPANIES | UNDER $500 | $501- $1 BILL | $1 - $3 BILL | OVER $3 BILL | 1-50 | 51- 100 | 101 + |
| TOTAL RESPONDENTS WITH A FORMAL EDUCATION PROGRAM FOR CURRENT MANAGERS | 27 | 6 | 13 | 4 | 4 | 10 | 7 | 10 |
| PLANNING AND ORGAINIZING | 92.6% | 83.3% | 92.3% | 100.0% | 100.0% | 90.0% | 85.7% | 100% |
| COMMUNICATION | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 |
| MOTIVATION | 88.9 | 83.3 | 84.6 | 100.0 | 100.0 | 80.0 | 85.7 | 100.0 |
| PERFORMANCE EVALUATION | 96.3 | 100.0 | 100.0 | 100.0 | 75.0 | 100.0 | 100.0 | 90.0 |
| DELEGATION | 85.2 | 66.7 | 92.3 | 100.0 | 75.0 | 80.0 | 85.7 | 90.0 |
| COUNSELING AND DISCIPLINE | 92.6 | 83.3 | 92.3 | 100.0 | 100.0 | 80.0 | 100.0 | 100.0 |
| OTHER | | | | | | | | |
| CULTURE | 3.7 | 16.7 | - | - | - | 10.0 | - | - |
| HIRING | 7.4 | 16.7 | - | 25.0 | - | 20.0 | - | - |
| ANALYZING A P&L STATEMENT/ FINANCIAL ISSUES | 14.8 | 16.7 | 15.4 | - | 25.0 | 20.0 | - | 20.0 |
| P.C. TRAINING | 3.7 | 16.7 | - | - | - | 10.0 | - | - |
| MERCHANDISING | 3.7 | - | 7.7 | - | - | 10.0 | - | - |
| TIME MANAGEMENT | 7.4 | - | 15.4 | - | - | - | - | 20.0 |
| SUPERMARKET SPECIFICS | 3.7 | - | 7.7 | - | - | - | - | 10.0 |
| TECHNICAL (NFI) | 3.7 | - | 7.7 | - | - | - | - | 10.0 |
| SCHEDULING | 7.4 | 33.3 | - | - | - | 10.0 | 14.3 | - |
| RETAIL SUPPORT SYSTEMS | 3.7 | 16.7 | - | - | - | 10.0 | - | - |
| LAWS | 3.7 | - | 7.7 | - | - | - | 14.3 | - |
| OPERATIONS (NFI) | 3.7 | - | 7.7 | - | - | - | 14.3 | - |
| MANAGEMENT DEVELOPMENT CENTER | 7.4 | - | - | 25.0 | 25.0 | - | 14.3 | 10.0 |
| E.A.P. | 3.7 | - | - | 25.0 | - | 10.0 | - | - |
| TRAINING OTHERS/ TECHNIQUES | 11.1 | 16.7 | 7.7 | 25.0 | - | 20.0 | - | 10.0 |
| EEO | 7.4 | - | 15.4 | - | - | - | 14.3 | 10.0 |
| BEHAVIOR | 3.7 | 16.7 | - | - | - | 10.0 | - | - |
| CORNELL COMPLETE MANAGER COURSE | 3.7 | 16.7 | - | - | - | 10.0 | - | - |
| LEADERSHIP | 7.4 | - | 7.7 | - | 25.0 | - | - | 20.0 |
| PROBLEM SOLVING | 3.7 | - | 7.7 | - | - | - | - | 10.0 |
| STRESS MANAGEMENT | 7.4 | - | 15.4 | - | - | - | - | 20.0 |
| AVIAN CONTRACT APPLICATION | 3.7 | - | - | - | 25.0 | - | - | 10.0 |

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

## TABLE 76

# INFLUENCE STORE MANAGERS HAVE IN THE FOLLOWING AREAS:

| | NONE | SOME | QUITE A LOT | MOST | ALMOST ALL |
|---|---|---|---|---|---|
| TOTAL | 60 | 60 | 60 | 60 | 60 |
| HIRING OF PART-TIME EMPLOYEES | 1.7% | 13.3% | 6.7% | 5.0% | 73.3% |
| FIRING OF PART-TIME EMPLOYEES | 1.7 | 3.3 | 13.3 | 20.0 | 61.7 |
| HIRING OF ALL DEPARTMENT MANAGERS | 5.0 | 11.7 | 15.0 | 20.0 | 46.7 |
| FIRING OF ALL DEPARTMENT MANAGERS | 1.7 | 6.7 | 10.0 | 38.3 | 43.3 |
| STORE POLICIES | - | 45.0 | 20.0 | 20.0 | 15.0 |
| PRICING | 35.0 | 53.3 | 5.0 | - | 6.7 |
| PRICING MARKDOWNS | 11.7 | 58.3 | 10.0 | 10.0 | 10.0 |
| SELECTION OF DEPARTMENT HEADS | 6.7 | 35.0 | 26.7 | 23.3 | 8.3 |
| MERCHANDISE SELECTION | 20.0 | 56.7 | 13.3 | 3.3 | 6.7 |
| SELECTING SALE ITEMS | 50.0 | 43.3 | 1.7 | - | 5.0 |

## TABLE 77

# RATINGS INFLUENCE STORE MANAGERS EXCERCISE IN DEVELOPMENT OF MARKETING/MERCHANDISING AND OTHER POLICIES FOR THE ENTIRE STORE

| | | ANNUAL SALES IN MILLIONS | | | | NUMBER OF STORES | | |
|---|---|---|---|---|---|---|---|---|
| | ALL COMPANIES | UNDER $500 | $501- $1 BILL | $1 - $3 BILL | OVER $3 BILL | 1-50 | 51- 100 | 101 + |
| TOTAL RESPONDENTS | 48 | 21 | 14 | 8 | 5 | 23 | 12 | 13 |
| NONE | 4.2% | 4.8% | 7.1% | - | - | 8.7% | - | - |
| SOME | 62.5 | 52.4 | 50.0 | 87.5 | 100.0 | 47.8 | 66.7 | 84.6 |
| QUITE A LOT | 27.1 | 38.1 | 28.6 | 12.5 | - | 34.8 | 33.3 | 7.7 |
| MOST | 2.1 | - | 7.1 | - | - | 4.3 | - | - |
| ALMOST ALL | 4.2 | 4.8 | 7.1 | - | - | 4.3 | - | 7.7 |

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

## TABLE 78A
## PROFILE OF PARTICIPANTS

| | | ANNUAL SALES IN MILLIONS | | | | | | | | NUMBER OF STORES | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | ALL COMPANIES | UNDER $10 | $11-$30 | $31-$100 | $101-$250 | $251-$500 | $501-$1 BIL | $1-$3 BILL | OVER $3 BILL | 1 | 2-10 | 11+ |
| TOTAL COMPANIES | 129 | 39 | 27 | 19 | 5 | 9 | 14 | 10 | 6 | 39 | 47 | 43 |

## TABLE 78B
## PROFILE OF PARTICIPANTS

| | | GEOGRAPHIC REGION OF HEADQUARTERS | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | ALL COMPANIES | NEW ENGLAND | MIDDLE ATLANTIC | EAST NORTH CENTRAL | WEST NORTH CENTRAL | SOUTH EAST | WEST SOUTH CENTRAL | MOUNTAIN | PACIFIC | CANADA |
| TOTAL COMPANIES | 129 | 14 | 16 | 27 | 11 | 30 | 8 | 8 | 13 | 2 |

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

## TABLE 79A

# AVERAGE PERCENTAGE OF THEFT LOSSES DUE TO THE FOLLOWING CAUSES

|  | ALL STORES | ANNUAL SALES IN MILLIONS |  |  |  |  |  |  |  | NUMBER OF STORES |  |  |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
|  |  | UNDER $10 | $11-$30 | $31-$100 | $101-$250 | $251-$500 | $501-$1 BIL | $1-$3 BILL | OVER $3 BILL | 1 | 2-10 | 11+ |
| TOTAL STORES | 8258 | 49 | 68 | 156 | 83 | 284 | 1126 | 1376 | 5116 | 39 | 198 | 8021 |
| EMPLOYEE/INTERNAL THEFT | 52.9% | 33.0% | 38.3% | 38.0% | 41.7% | 55.8% | 45.4% | 63.7% | 53.0% | 36.1% | 45.4% | 53.1% |
| SHOPLIFTING | 27.1 | 56.4 | 46.7 | 36.3 | 40.8 | 25.5 | 34.6 | 21.1 | 25.6 | 51.5 | 39.8 | 26.8 |
| VENDOR THEFT | 13.0 | 10.1 | 14.4 | 17.5 | 12.0 | 15.1 | 14.1 | 8.3 | 13.7 | 11.8 | 13.8 | 13.0 |
| ROBBERIES * | 3.4 | .5 | 0 | 4.0 | 1.0 | 2.3 | 2.8 | 2.1 | 4.2 | .6 | .4 | 3.5 |
| BURGLARIES ** | 3.6 | 0 | .6 | 4.2 | 4.5 | 1.4 | 3.1 | 4.9 | 3.5 | 0 | .7 | 3.6 |

## TABLE 79B

# AVERAGE PERCENTAGE OF THEFT LOSSES DUE TO THE FOLLOWING CAUSES

|  | ALL STORES | GEOGRAPHIC REGION OF HEADQUARTERS |  |  |  |  |  |  |  |  |
|---|---|---|---|---|---|---|---|---|---|---|
|  |  | NEW ENGLAND | MIDDLE ATLANTIC | EAST NORTH CENTRAL | WEST NORTH CENTRAL | SOUTH EAST | WEST SOUTH CENTRAL | MOUNTAIN | PACIFIC | CANADA |
| TOTAL STORES | 8258 | 120 | 1801 | 1260 | 567 | 2191 | 382 | 39 | 1769 | 129 |
| EMPLOYEE/INTERNAL THEFT | 52.9% | 59.5% | 57.2% | 58.7% | 70.2% | 43.5% | 49.9% | 38.7% | 40.0% | 41.7% |
| SHOPLIFTING | 27.1 | 32.0 | 20.7 | 18.5 | 22.6 | 35.2 | 28.9 | 50.3 | 40.4 | 33.7 |
| VENDOR THEFT | 13.0 | 6.7 | 13.2 | 14.6 | 5.1 | 15.2 | 8.0 | 9.6 | 15.7 | 10.0 |
| ROBBERIES * | 3.4 | 1.2 | 3.8 | 4.2 | 1.8 | 3.4 | 4.4 | 1.3 | 2.9 | 4.6 |
| BURGLARIES ** | 3.6 | .6 | 5.3 | 4.0 | .4 | 2.8 | 8.8 | 0 | 1.0 | 10.0 |

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

* ROBBERY - IS THE TAKING OR ATTEMPTING TO TAKE ANYTHING OF VALUE FROM THE CARE, CUSTODY, OR CONTROL OF A PERSON OR PERSONS BY FORCE OR THREAT OF FORCE OR VIOLENCE AND/OR BY PUTTING THE VICTIM IN FEAR.

** BURGLARY - UNLAWFUL ENTRY OF ANY FIXED STRUCTURE, VEHICLE OR VESSEL USED FOR REGULAR RESIDENCE, INDUSTRY OR BUSINESS, WITH OR WITHOUT FORCE, WITH THE INTENT TO COMMIT A FELONY OR LARCENY.

## TABLE 79C

# AVERAGE PERCENTAGE OF THEFT LOSSES DUE TO EMPLOYEE THEFT

| | ALL STORES | GEOGRAPHIC REGION OF HEADQUARTERS | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | | NEW ENGLAND | MIDDLE ATLANTIC | EAST NORTH CENTRAL | WEST NORTH CENTRAL | SOUTH EAST | WEST SOUTH CENTRAL | MOUNTAIN | PACIFIC | CANADA |
| TOTAL STORES | 6010 | 110 | 1751 | 1221 | 557 | 697 | 310 | 29 | 1206 | 129 |
| EMPLOYEE/INTERNAL THEFT | 52.9% | 59.5% | 57.2% | 58.7% | 70.2% | 43.5% | 49.9% | 38.7% | 40.0% | 41.7% |
| STANDARD DEVIATION | 20.4 | 19.3 | 11.8 | 22.9 | 25.1 | 17.2 | 8.3 | 8.1 | 27.1 | 20.0 |
| STANDARD ERROR | 2.2 | 6.1 | 3.7 | 5.6 | 8.4 | 4.0 | 4.1 | 4.2 | 9.6 | 14.1 |

## TABLE 79D

# AVERAGE PERCENTAGE OF THEFT LOSSES DUE TO SHOPLIFTING

| | ALL STORES | ANNUAL SALES IN MILLIONS | | | | | | | | NUMBER OF STORES | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | UNDER $10 | $11-$30 | $31-$100 | $101-$250 | $251-$500 | $501-$1 BIL | $1-$3 BILL | OVER $3 BILL | 1 | 2-10 | 11+ |
| TOTAL STORES | 6010 | 28 | 27 | 108 | 74 | 221 | 1083 | 965 | 3504 | 24 | 94 | 5892 |
| SHOPLIFTING | 27.1% | 56.4% | 46.7% | 36.3% | 40.8% | 25.5% | 34.6% | 21.1% | 25.6% | 51.5% | 39.8% | 26.8% |
| STANDARD DEVIATION | 22.1 | 22.9 | 24.1 | 17.7 | 22.9 | 9.0 | 13.5 | 8.2 | 9.6 | 23.6 | 22.9 | 14.8 |
| STANDARD ERROR | 2.4 | 4.8 | 6.4 | 5.3 | 11.4 | 3.4 | 3.7 | 3.1 | 4.8 | 4.8 | 4.7 | 2.5 |

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

LOSS PREVENTION ISSUES SURVEY

TABLE 80

## MEDIAN NUMBER OF INCIDENTS OF EMPLOYEE THEFT DISCOVERED PER STORE IN 1988

| | MEDIAN | MIDDLE RANGE | | NUMBER PARTICIPATING |
|---|---|---|---|---|
| ALL COMPANIES | 2.0 | 1.0 | 3.0 | 6783 |
| COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS) | | | | |
| UNDER 10 | 1.0 | 1.0 | 3.0 | 43 |
| 10 - 30 | 2.0 | 1.0 | 3.0 | 58 |
| 31 - 100 | 1.5 | 1.0 | 3.0 | 147 |
| 101 - 250 | 2.0 | 1.0 | 3.0 | 83 |
| 251 - 500 | 2.0 | 1.0 | 4.0 | 249 |
| 500 - 1 BILLION | 2.0 | 1.0 | 3.0 | 1067 |
| 1-3 BILLION | 1.0 | 1.0 | 15.0 | 982 |
| OVER 3 BILLION | 1.0 | 1.0 | 5.0 | 4156 |
| GEOGRAPHIC REGION OF STORES | | | | |
| NORTHEAST | 2.5 | 1.5 | 3.0 | 116 |
| MID ATLANTIC | 2.5 | 1.0 | 4.0 | 1799 |
| EAST NORTH CENTRAL | 2.0 | 1.0 | 5.0 | 276 |
| WEST NORTH CENTRAL | 2.0 | 0 | 3.0 | 505 |
| SOUTHEAST | 1.5 | 1.0 | 3.0 | 1857 |
| WEST SOUTH CENTRAL | 1.0 | 1.0 | 8.0 | 363 |
| MOUNTAIN | 1.0 | 0 | 4.0 | 39 |
| PACIFIC | 1.5 | 1.0 | 2.5 | 1699 |
| CANADA | .5 | 0 | 1.0 | 129 |
| NUMBER OF STORES | | | | |
| 1 STORE | 2.0 | 0 | 5.0 | 35 |
| 2 - 10 STORES | 2.0 | 1.0 | 3.0 | 177 |
| 11 + STORES | 1.0 | 1.0 | 3.0 | 6571 |

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

## TABLE 81A
## MEAN OF THE AVERAGE KNOWN VALUE OF CASH/MERCHANDISE RECOVERED IN EACH INSTANCE OF EMPLOYEE THEFT

| | ALL COMPANIES | ANNUAL SALES IN MILLIONS<br>UNDER $10 | $11-$30 | $31-$100 | $101-$250 | $251-$500 | $501-$1 BIL | $1-$3 BILL | OVER $3 BILL | NUMBER OF STORES<br>1 | 2-10 | 11+ |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| TOTAL RESPONDENTS | 83 | 24 | 18 | 14 | 5 | 5 | 8 | 7 | 2 | 22 | 35 | 26 |
| MEAN OF THE AVERAGE KNOWN VALUE OF CASH/MERCHANDISE RECOVERED | $104 | $97 | $23 | $120 | $102 | $81 | $103 | $273 | | $103 | $57 | $165 |

## TABLE 81B
## MEAN OF THE AVERAGE KNOWN VALUE OF CASH/MERCHANDISE RECOVERED IN EACH INSTANCE OF EMPLOYEE THEFT

| | ALL COMPANIES | GEOGRAPHIC REGION OF HEADQUARTERS<br>NEW ENGLAND | MIDDLE ATLANTIC | EAST NORTH CENTRAL | WEST NORTH CENTRAL | SOUTH EAST | WEST SOUTH CENTRAL | MOUNTAIN | PACIFIC | CANADA |
|---|---|---|---|---|---|---|---|---|---|---|
| TOTAL RESPONDENTS | 83 | 7 | 12 | 18 | 7 | 20 | 4 | 4 | 9 | 2 |
| MEAN OF THE AVERAGE KNOWN VALUE OF CASH/MERCHANDISE RECOVERED | $104 | $67 | $75 | $89 | $155 | $111 | $92 | $53 | $141 | |

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

### TABLE 82A

## MEDIAN NUMBER OF SHOPLIFTERS APPREHENDED PER STORE IN 1988

| | MEDIAN | MIDDLE RANGE | | NUMBER PARTICIPATING |
|---|---|---|---|---|
| ALL STORES | 15.0 | 7.0 | 30.0 | 6778 |
| COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS) | | | | |
| UNDER 10 | 14.0 | 6.0 | 20.0 | 46 |
| 10 - 30 | 11.0 | 6.0 | 17.5 | 58 |
| 31 - 100 | 24.5 | 7.5 | 74.0 | 141 |
| 101 - 250 | 30.0 | 22.0 | 35.0 | 83 |
| 251 - 500 | 9.0 | 3.0 | 23.0 | 221 |
| 500 - 1 BILLION | 25.0 | 11.0 | 51.0 | 1067 |
| 1-3 BILLION | 8.0 | 4.0 | 15.0 | 1306 |
| OVER 3 BILLION | 22.0 | 21.0 | 26.0 | 3856 |
| GEOGRAPHIC REGION OF HEADQUARTERS | | | | |
| NEW ENGLAND | 14.0 | 6.0 | 15.0 | 118 |
| MID ATLANTIC | 14.0 | 8.5 | 21.0 | 1801 |
| EAST NORTH CENTRAL | 20.0 | 8.0 | 30.0 | 1255 |
| WEST NORTH CENTRAL | 22.0 | 8.0 | 80.0 | 508 |
| SOUTHEAST | 8.0 | 5.0 | 20.0 | 920 |
| WEST SOUTH CENTRAL | 11.0 | 9.0 | 59.0 | 315 |
| MOUNTAIN | 19.0 | 3.0 | 40.0 | 38 |
| PACIFIC | 26.0 | 15.0 | 45.0 | 1694 |
| CANADA | 19.0 | 4.0 | 34.0 | 129 |
| NUMBER OF STORES | | | | |
| 1 STORE | 15.0 | 10.0 | 25.0 | 37 |
| 2 - 10 STORES | 13.0 | 5.0 | 34.0 | 172 |
| 11 + STORES | 19.5 | 6.0 | 34.0 | 6569 |

### TABLE 82B

## MEDIAN NUMBER OF SHOPLIFTERS APPREHENDED PER STORE IN 1988

| | | PERCENTAGE OF ANNUAL SALES BUDGETED TO LOSS PREVENTION | | | | STORES IN COMPANIES WITH A FULL-TIME LOSS PREVENTION PERSON |
|---|---|---|---|---|---|---|
| | ALL STORES | .01% TO .09% | .10% TO .19% | .20% TO .29% | .30% TO .50% | |
| TOTAL STORES | 6768 | 2285 | 1894 | 204 | 315 | 4638 |
| MEDIAN OF THE AVERAGE NUMBER OF SHOPLIFTERS APPREHENDED PER STORE | 15 | 19 | 15 | 21 | 35 | 23 |

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

### TABLE 83A

## AVERAGE VALUE OF THE MERCHANDISE RECOVERED IN EACH INSTANCE OF SHOPLIFTING

| | | ANNUAL SALES IN MILLIONS | | | | | | | | NUMBER OF STORES | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | ALL STORES | UNDER $10 | $11-$30 | $31-$100 | $101-$250 | $251-$500 | $501-$1 BIL | $1-$3 BILL | OVER $3 BILL | 1 | 2-10 | 11+ |
| TOTAL RESPONDENTS | 110 | 35 | 22 | 16 | 5 | 7 | 13 | 8 | 4 | 35 | 39 | 36 |
| AVERAGE VALUE OF THE MERCHANDISE RECOVERED | $12.70 | $10.70 | $16.05 | $10.44 | $9.14 | $20.09 | $13.26 | $12.73 | $13.12 | $11.57 | $12.78 | $14.01 |

### TABLE 83B

## AVERAGE VALUE OF THE MERCHANDISE RECOVERED IN EACH INSTANCE OF SHOPLIFTING

| | | GEOGRAPHIC REGION OF HEADQUARTERS | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | ALL STORES | NEW ENGLAND | MIDDLE ATLANTIC | EAST NORTH CENTRAL | WEST NORTH CENTRAL | SOUTH EAST | WEST SOUTH CENTRAL | MOUNTAIN | PACIFIC | CANADA |
| TOTAL RESPONDENTS | 110 | 11 | 15 | 24 | 10 | 25 | 5 | 7 | 11 | 2 |
| AVERAGE VALUE OF THE MERCHANDISE RECOVERED | $12.70 | $16.52 | $16.26 | $10.60 | $10.61 | $10.93 | $10.09 | $19.51 | $10.15 | |

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

## TABLE 84A
## MEDIAN NUMBER OF SHOPLIFTERS ARRESTED PER STORE

| | MEDIAN | MIDDLE RANGE | | NUMBER PARTICIPATING |
|---|---|---|---|---|
| ALL COMPANIES | 9.0 | 3.0 | 23.0 | 6629 |
| COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS) | | | | |
| UNDER 10 | 10.0 | 3.0 | 19.0 | 44 |
| 10 - 30 | 3.5 | 1.0 | 13.0 | 57 |
| 31 - 100 | 18.0 | 2.0 | 45.0 | 143 |
| 101 - 250 | 29.5 | 18.5 | 41.0 | 52 |
| 251 - 500 | 7.0 | 3.0 | 23.0 | 221 |
| 500 - 1 BILLION | 11.0 | 5.0 | 25.0 | 1067 |
| 1-3 BILLION | 4.5 | 3.0 | 7.5 | 1189 |
| OVER 3 BILLION | 15.0 | 13.0 | 16.0 | 3856 |
| GEOGRAPHIC REGION OF STORES | | | | |
| NORTHEAST | 3.5 | 1.0 | 13.5 | 115 |
| MID ATLANTIC | 6.0 | 2.0 | 13.0 | 1800 |
| EAST NORTH CENTRAL | 8.0 | 4.0 | 23.0 | 1255 |
| WEST NORTH CENTRAL | 12.0 | 3.0 | 25.0 | 508 |
| SOUTHEAST | 4.5 | 1.5 | 13.5 | 771 |
| WEST SOUTH CENTRAL | 10.0 | 9.0 | 56.0 | 315 |
| MOUNTAIN | 19.5 | 10.0 | 30.0 | 37 |
| PACIFIC | 15.5 | 4.0 | 41.5 | 1699 |
| CANADA | 18.0 | 4.0 | 32.0 | 129 |
| NUMBER OF STORES | | | | |
| 1 STORE | 10.0 | 3.0 | 15.0 | 34 |
| 2 - 10 STORES | 5.0 | 2.0 | 30.0 | 174 |
| 11 + STORES | 10.5 | 4.0 | 24.0 | 6421 |

## TABLE 84B
## MEDIAN NUMBER OF SHOPLIFTERS ARRESTED PER STORE

| | | PERCENTAGE OF ANNUAL SALES BUDGETED TO LOSS PREVENTION | | | | STORES IN COMPANIES WITH A FULL-TIME LOSS PREVENTION PERSON |
|---|---|---|---|---|---|---|
| | ALL STORES | .01% TO .09% | .10% TO .19% | .20% TO .29% | .30% TO .50% | |
| TOTAL STORES | 6629 | 2254 | 1898 | 204 | 315 | 4607 |
| MEDIAN NUMBER OF SHOPLIFTERS ARRESTED | 9 | 15 | 7 | 18 | 28 | 15 |

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

## TABLE 85A

## MEDIAN NUMBER OF SHOPLIFTERS PROSECUTED PER STORE

| | MEDIAN | MIDDLE RANGE | | NUMBER PARTICIPATING |
|---|---|---|---|---|
| ALL COMPANIES | 6.5 | 2.0 | 20.0 | 6654 |
| **COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)** | | | | |
| UNDER 10 | 7.5 | 3.0 | 19.0 | 43 |
| 10 - 30 | 1.0 | 0 | 5.0 | 52 |
| 31 - 100 | 9.0 | 2.0 | 25.0 | 143 |
| 101 - 250 | 29.0 | 8.0 | 30.0 | 83 |
| 251 - 500 | 7.0 | 3.0 | 23.0 | 221 |
| 500 - 1 BILLION | 10.0 | 5.0 | 25.0 | 1067 |
| 1-3 BILLION | 4.0 | 3.0 | 7.5 | 1189 |
| OVER 3 BILLION | 13.0 | 5.0 | 16.0 | 3856 |
| **GEOGRAPHIC REGION OF STORES** | | | | |
| NORTHEAST | 2.0 | 0 | 12.0 | 108 |
| MID ATLANTIC | 4.0 | 2.0 | 11.0 | 1801 |
| EAST NORTH CENTRAL | 7.0 | 3.0 | 23.0 | 1255 |
| WEST NORTH CENTRAL | 8.5 | 0 | 25.0 | 508 |
| SOUTHEAST | 4.0 | 1.0 | 12.0 | 802 |
| WEST SOUTH CENTRAL | 10.0 | 9.0 | 56.0 | 315 |
| MOUNTAIN | 19.5 | 7.0 | 30.0 | 37 |
| PACIFIC | 10.5 | 2.0 | 33.5 | 1699 |
| CANADA | 16.5 | 4.0 | 29.0 | 129 |
| **NUMBER OF STORES** | | | | |
| 1 STORE | 6.0 | 2.0 | 15.0 | 34 |
| 2 - 10 STORES | 4.0 | 0 | 25.0 | 168 |
| 11 + STORES | 7.0 | 4.0 | 23.0 | 6452 |

## TABLE 85B

## MEDIAN NUMBER OF SHOPLIFTERS PROSECUTED PER STORE

| | | PERCENTAGE OF ANNUAL SALES BUDGETED TO LOSS PREVENTION | | | | STORES IN COMPANIES WITH A FULL-TIME LOSS PREVENTION PERSON |
|---|---|---|---|---|---|---|
| | ALL STORES | .01% TO .09% | .10% TO .19% | .20% TO .29% | .30% TO .50% | |
| TOTAL STORES | 4703 | 2285 | 1899 | 204 | 315 | 4638 |
| MEDIAN NUMBER OF SHOPLIFTERS PROSECUTED | 6.5 | 11 | 4 | 16 | 28 | 11 |

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

## TABLE 86

# MEDIAN APPROXIMATE CONVICTION RATE OF THOSE SHOPLIFTERS PROSECUTED

| | MEDIAN | MIDDLE RANGE | | NUMBER PARTICIPATING |
|---|---|---|---|---|
| ALL COMPANIES | 95.0% | 80.0% | 100.0% | 100 |
| COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS) | | | | |
| UNDER 10 | 97.5 | 80.0 | 100.0 | 26 |
| 10 - 30 | 75.0 | 0 | 90.0 | 17 |
| 31 - 100 | 100.0 | 80.0 | 100.0 | 17 |
| 101 - 250 | 95.0 | 95.0 | 100.0 | 5 |
| 251 - 500 | 97.0 | 95.0 | 99.5 | 8 |
| 500 - 1 BILLION | 95.0 | 80.0 | 99.0 | 13 |
| 1-3 BILLION | 98.0 | 95.0 | 99.0 | 9 |
| OVER 3 BILLION | 95.0 | 95.0 | 97.0 | 5 |
| GEOGRAPHIC REGION OF HEADQUARTERS | | | | |
| NEW ENGLAND | 100.0 | 5.0 | 100.0 | 9 |
| MID ATLANTIC | 95.0 | 80.0 | 98.0 | 14 |
| EAST NORTH CENTRAL | 99.0 | 90.0 | 100.0 | 21 |
| WEST NORTH CENTRAL | 80.0 | 57.0 | 99.0 | 10 |
| SOUTHEAST | 95.0 | 82.5 | 99.5 | 24 |
| WEST SOUTH CENTRAL | 95.0 | 95.0 | 99.0 | 5 |
| MOUNTAIN | 100.0 | 99.0 | 100.0 | 6 |
| PACIFIC | 95.0 | 85.0 | 97.0 | 9 |
| CANADA | | | | 2 |
| NUMBER OF STORES | | | | |
| 1 STORE | 100.0 | 50.0 | 100.0 | 27 |
| 2 - 10 STORES | 95.0 | 75.0 | 100.0 | 34 |
| 11 + STORES | 95.0 | 94.0 | 99.0 | 39 |

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

## TABLE 87
## TYPE OF MERCHANDISE MOST OFTEN TAKEN

|  | MOST OFTEN | SECOND MOST OFTEN | THIRD MOST OFTEN |
|---|---|---|---|
| TOTAL | 110 | 109 | 107 |
| CIGARETTES | 55.5% | 27.5% | 4.7% |
| H&BA ITEMS | 22.7 | 28.4 | 32.7 |
| MEAT | 15.5 | 29.4 | 33.6 |
| SEAFOOD | 2.7 | .9 | 1.9 |
| DELI | - | 2.8 | 1.9 |
| VITAMINS | - | 2.8 | 1.9 |
| OTHER FOODS | 1.8 | .9 | 5.6 |
| BATTERIES | .9 | 1.8 | 5.6 |
| CLOTHING | - | 1.8 | - |
| SCHOOL SUPPLIES | - | - | 2.8 |
| PET SUPPLIES | - | - | .9 |
| OTHER NON-FOODS | - | 1.8 | 4.7 |
| OTHER | .9 | 1.8 | 3.7 |

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

## TABLE 88A
## PERCENTAGE OF COMPANIES USING CIVIL RECOVERY STANDARDS TO RECOUP SOME OF THE COSTS OF APPREHENDING SHOPLIFTERS

| | | ANNUAL SALES IN MILLIONS | | | | | | | | NUMBER OF STORES | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | ALL COMPANIES | UNDER $10 | $11-$30 | $31-$100 | $101-$250 | $251-$500 | $501-$1 BIL | $1-$3 BILL | OVER $3 BILL | 1 | 2-10 | 11+ |
| TOTAL RESPONDENTS | 113 | 33 | 23 | 16 | 5 | 8 | 12 | 10 | 6 | 34 | 39 | 40 |
| USE THE CIVIL RECOVERY STANDARDS | 35.4% | 30.3% | 30.4% | 25.0% | 80.0% | 37.5% | 50.0% | 30.0% | 50.0% | 26.5% | 33.3% | 45.0% |
| DO NOT USE THE CIVIL RECOVERY STANDARDS | 64.6 | 69.7 | 69.6 | 75.0 | 20.0 | 62.5 | 50.0 | 70.0 | 50.0 | 73.5 | 66.7 | 55.0 |

## TABLE 88B
## PERCENTAGE OF COMPANIES USING CIVIL RECOVERY STANDARDS TO RECOUP SOME OF THE COSTS OF APPREHENDING SHOPLIFTERS

| | | GEOGRAPHIC REGION OF HEADQUARTERS | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | ALL COMPANIES | NEW ENGLAND | MIDDLE ATLANTIC | EAST NORTH CENTRAL | WEST NORTH CENTRAL | SOUTH EAST | WEST SOUTH CENTRAL | MOUNTAIN | PACIFIC | CANADA |
| TOTAL RESPONDENTS | 113 | 13 | 12 | 25 | 10 | 26 | 5 | 8 | 13 | 1 |
| USE THE CIVIL RECOVERY STANDARDS | 35.4% | 30.8% | 25.0% | 36.0% | 40.0% | 15.4% | 20.0% | 50.0% | 84.6% | |
| DO NOT USE THE CIVIL RECOVERY STANDARDS | 64.6 | 69.2 | 75.0 | 64.0 | 60.0 | 84.6 | 80.0 | 50.0 | 15.4 | |

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

## TABLE 89A

# PERCENTAGE OF COMPANIES WITH A FORMAL POLICY/PROCEDURE FOR DEALING WITH SHOPLIFTERS ONCE APPREHENDED

| | | ANNUAL SALES IN MILLIONS | | | | | | | | NUMBER OF STORES | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | ALL COMPANIES | UNDER $10 | $11-$30 | $31-$100 | $101-$250 | $251-$500 | $501-$1 BIL | $1-$3 BILL | OVER $3 BILL | 1 | 2-10 | 11+ |
| TOTAL RESPONDENTS | 128 | 39 | 27 | 19 | 5 | 9 | 13 | 10 | 6 | 39 | 47 | 42 |
| HAVE A FORMAL POLICY/ PROCEDURE | 82.0% | 76.9% | 63.0% | 84.2% | 100.0% | 100.0% | 92.3% | 100.0% | 100.0% | 79.5% | 70.2% | 97.6% |
| DO NOT HAVE A FORMAL POLICY/PROCEDURE | 18.0 | 23.1 | 37.0 | 15.8 | - | - | 7.7 | - | - | 20.5 | 29.8 | 2.4 |

## TABLE 89B

# PERCENTAGE OF COMPANIES WITH A FORMAL POLICY/PROCEDURE FOR DEALING WITH SHOPLIFTERS ONCE APPREHENDED

| | | GEOGRAPHIC REGION OF HEADQUARTERS | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | ALL COMPANIES | NEW ENGLAND | MIDDLE ATLANTIC | EAST NORTH CENTRAL | WEST NORTH CENTRAL | SOUTH EAST | WEST SOUTH CENTRAL | MOUNTAIN | PACIFIC | CANADA |
| TOTAL RESPONDENTS | 128 | 14 | 16 | 27 | 10 | 30 | 8 | 8 | 13 | 2 |
| HAVE A FORMAL POLICY/ PROCEDURE | 82.0% | 71.4% | 81.3% | 88.9% | 80.0% | 73.3% | 87.5% | 87.5% | 92.3% | |
| DO NOT HAVE A FORMAL POLICY/PROCEDURE | 18.0 | 28.6 | 18.8 | 11.1 | 20.0 | 26.7 | 12.5 | 12.5 | 7.7 | |

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

## TABLE 90A
# PERCENTAGE OF STORES WHICH HAVE INSTALLED THE FOLLOWING SECURITY DEVICES

| | | ANNUAL SALES IN MILLIONS | | | | | | | | NUMBER OF STORES | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | ALL STORES | UNDER $10 | $11-$30 | $31-$100 | $101-$250 | $251-$500 | $501-$1 BIL | $1-$3 BILL | OVER $3 BILL | 1 | 2-10 | 11+ |
| TOTAL STORES | 8258 | 49 | 68 | 156 | 83 | 284 | 1126 | 1376 | 5116 | 39 | 198 | 8021 |
| ELECTRONIC ARTICLE SURVEILLANCE | 2.6% | 4.1% | 2.9% | 40/4% | - | 3.2% | 1.3% | 6.0% | .8% | 2.6% | 20.7% | 2.1% |
| VIDEO SURVEILLANCE | 9.8 | 40.8 | 22.1 | 18.6 | 10.8 | 27.1 | 11.2 | 14.0 | 6.7 | 35.9 | 25.3 | 9.3 |

## TABLE 90B
# PERCENTAGE OF STORES WHICH HAVE INSTALLED THE FOLLOWING SECURITY DEVICES

| | | GEOGRAPHIC REGION OF HEADQUARTERS | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | ALL STORES | NEW ENGLAND | MIDDLE ATLANTIC | EAST NORTH CENTRAL | WEST NORTH CENTRAL | SOUTH EAST | WEST SOUTH CENTRAL | MOUNTAIN | PACIFIC | CANADA |
| TOTAL STORES | 8258 | 120 | 1801 | 1260 | 567 | 2191 | 382 | 39 | 1769 | 129 |
| ELECTRONIC ARTICLE SURVEILLANCE | 2.6% | 4.2% | .8% | .3% | 3.4% | 2.8% | 4.5% | - | 5.0% | 1.6% |
| VIDEO SURVEILLANCE | 9.8 | 12.5 | 18.0 | 6.7 | 12.5 | 4.2 | 30.9 | 23.1 | 4.2 | 20.2 |

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

## TABLE 91A
## AVERAGE NUMBER OF ROBBERIES EXPERIENCED PER STORE IN 1988

| | | ANNUAL SALES IN MILLIONS | | | | | | | | NUMBER OF STORES | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | ALL STORES | UNDER $10 | $11-$30 | $31-$100 | $101-$250 | $251-$500 | $501-$1 BIL | $1-$3 BILL | OVER $3 BILL | 1 | 2-10 | 11+ |
| TOTAL STORES | 5479 | 49 | 66 | 156 | 62 | 269 | 1067 | 916 | 2894 | 39 | 187 | 5253 |
| AVERAGE NUMBER OF ROBBERIES PER STORE IN 1988 | .1 | .1 | .1 | .1 | 0 | 0 | 0 | 0 | 0 | .1 | .1 | 0 |

## TABLE 91B
## AVERAGE NUMBER OF ROBBERIES EXPERIENCED PER STORE IN 1988

| | | GEOGRAPHIC REGION OF HEADQUARTERS | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | ALL STORES | NEW ENGLAND | MIDDLE ATLANTIC | EAST NORTH CENTRAL | WEST NORTH CENTRAL | SOUTH EAST | WEST SOUTH CENTRAL | MOUNTAIN | PACIFIC | CANADA |
| TOTAL STORES | 5479 | 120 | 1801 | 289 | 118 | 931 | 367 | 39 | 1685 | 129 |
| AVERAGE NUMBER OF ROBBERIES PER STORE IN 1988 | .1 | .1 | .1 | 0 | 0 | 0 | 0 | .4 | .1 | 0 |

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

## TABLE 92
## MEDIAN OF THE AVERAGE DOLLAR AMOUNT TAKEN IN EACH INSTANCE OF ROBBERY

| | MEDIAN | MIDDLE RANGE | | NUMBER PARTICIPATING |
|---|---|---|---|---|
| ALL COMPANIES | $966 | $300 | $2100 | 37 |
| COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS) | | | | |
| UNDER 250 | 850 | 300 | 4000 | 14 |
| 251 + | 996 | 285 | 2100 | 23 |
| NUMBER OF STORES | | | | |
| 1 STORE | | | | 2 |
| 2 - 10 STORES | 2650 | 700 | 4000 | 10 |
| 11 + STORES | 680 | 212 | 1611 | 25 |

## TABLE 93
## TIME OF DAY ROBBERIES MOST FREQUENTLY OCCUR

| | TOTAL |
|---|---|
| TOTAL RESPONDENTS WITH ROBBERIES | 39 |
| MIDNIGHT - 6AM | 10.3% |
| 6AM - NOON | 7.7 |
| NOON - 6PM | 20.5 |
| 6PM - MIDNIGHT | 61.5 |

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

## TABLE 94
## DAY OF THE WEEK ON WHICH MOST ROBBERIES OCCUR

| | TOTAL |
|---|---|
| TOTAL RESPONDENTS WITH ROBBERIES | 33 |
| MONDAY | 6.1% |
| TUESDAY | 9.1 |
| WEDNESDAY | 15.2 |
| THURSDAY | 21.2 |
| FRIDAY | 15.2 |
| SATURDAY | 21.2 |
| SUNDAY | 12.1 |

## TABLE 95A
## AVERAGE NUMBER OF BURGLARIES EXPERIENCED PER STORE IN 1988

| | | ANNUAL SALES IN MILLIONS | | | | | | | | NUMBER OF STORES | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | ALL STORES | UNDER $10 | $11-$30 | $31-$100 | $101-$250 | $251-$500 | $501-$1 BIL | $1-$3 BILL | OVER $3 BILL | 1 | 2-10 | 11+ |
| TOTAL STORES | 5388 | 46 | 49 | 149 | 62 | 269 | 1067 | 852 | 2894 | 34 | 165 | 5189 |
| AVERAGE NUMBER OF BURGLARIES PER STORE IN 1988 | .3 | .1 | 1.0 | .2 | 0 | .4 | 0 | 1 | 0 | 1 | 6 | 2 |

## TABLE 95B
## AVERAGE NUMBER OF BURGLARIES EXPERIENCED PER STORE IN 1988

| | | GEOGRAPHIC REGION OF HEADQUARTERS | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | ALL STORES | NEW ENGLAND | MIDDLE ATLANTIC | EAST NORTH CENTRAL | WEST NORTH CENTRAL | SOUTH EAST | WEST SOUTH CENTRAL | MOUNTAIN | PACIFIC | CANADA |
| TOTAL STORES | 5388 | 117 | 1799 | 285 | 107 | 927 | 362 | 39 | 1623 | 129 |
| AVERAGE NUMBER OF BURGLARIES PER STORE IN 1988 | .3 | 0 | .1 | .2 | 0 | .1 | .2 | 0 | 1.7 | .5 |

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

### TABLE 96
## MEDIAN OF THE AVERAGE DOLLAR AMOUNT OF CASH/MERCHANDISE TAKEN IN EACH INSTANCE OF BURGLARY

| | MEDIAN | MIDDLE RANGE | | NUMBER PARTICIPATING |
|---|---|---|---|---|
| ALL COMPANIES | $600 | $210 | $1500 | 31 |
| COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS) | | | | |
| UNDER 250 | 550 | 180 | 1500 | 12 |
| 251 + | 690 | 300 | 1446 | 19 |
| NUMBER OF STORES | | | | |
| 1 STORE | | | | 2 |
| 2 - 10 STORES | 600 | 150 | 1500 | 7 |
| 11 + STORES | 595 | 300 | 1446 | 22 |

### TABLE 97A
## AVERAGE NUMBER OF SHOPPING CARTS LOST PER STORE IN 1988

| | | ANNUAL SALES IN MILLIONS | | | | | | | | NUMBER OF STORES | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | ALL STORES | UNDER $10 | $11-$30 | $31-$100 | $101-$250 | $251-$500 | $501-$1 BIL | $1-$3 BILL | OVER $3 BILL | 1 | 2-10 | 11+ |
| TOTAL STORES | 3198 | 41 | 40 | 121 | 83 | 149 | 889 | 273 | 1602 | 35 | 131 | 3032 |
| AVERAGE NUMBER OF SHOPPING CARTS LOST PER STORE IN 1988 | 11 | 6 | 13 | 11 | 10 | 25 | 21 | 9 | 14 | 6 | 12 | 17 |

### TABLE 97B
## AVERAGE NUMBER OF SHOPPING CARTS LOST PER STORE IN 1988

| | | GEOGRAPHIC REGION OF HEADQUARTERS | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | ALL STORES | NEW ENGLAND | MIDDLE ATLANTIC | EAST NORTH CENTRAL | WEST NORTH CENTRAL | SOUTH EAST | WEST SOUTH CENTRAL | MOUNTAIN | PACIFIC | CANADA |
| TOTAL STORES | 3198 | 113 | 1479 | 287 | 77 | 374 | 170 | 31 | 538 | 129 |
| AVERAGE NUMBER OF SHOPPING CARTS LOST PER STORE IN 1988 | 11 | 17 | 17 | 6 | 10 | 8 | 36 | 13 | 10 | 6 |

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

LOSS PREVENTION ISSUES SURVEY

**TABLE 98A**

## AVERAGE VALUE OF THE LOST CARTS

|  | ALL STORES | ANNUAL SALES IN MILLIONS |  |  |  |  |  |  |  | NUMBER OF STORES |  |  |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
|  |  | UNDER $10 | $11-$30 | $31-$100 | $101-$250 | $251-$500 | $501-$1 BIL | $1-$3 BILL | OVER $3 BILL | 1 | 2-10 | 11+ |
| TOTAL STORES | 3029 | 25 | 34 | 93 | 71 | 189 | 743 | 272 | 1602 | 19 | 96 | 2914 |
| AVERAGE VALUE OF THE LOST CARTS | $1250 | $819 | $1563 | $1028 | $1146 | $1540 | $1799 | $902 | $365 | $937 | $1432 | $1269 |

**TABLE 98B**

## AVERAGE VALUE OF THE LOST CARTS

|  | ALL STORES | GEOGRAPHIC REGION OF HEADQUARTERS |  |  |  |  |  |  |  |  |
|---|---|---|---|---|---|---|---|---|---|---|
|  |  | NEW ENGLAND | MIDDLE ATLANTIC | EAST NORTH CENTRAL | WEST NORTH CENTRAL | SOUTH EAST | WEST SOUTH CENTRAL | MOUNTAIN | PACIFIC | CANADA |
| TOTAL STORES | 3029 | 110 | 1479 | 268 | 107 | 213 | 170 | 28 | 525 | 129 |
| AVERAGE VALUE OF THE LOST CARTS | $1250 | $2247 | $1357 | $872 | $579 | $888 | $2901 | $2022 | $766 | $567 |

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

## TABLE 99A
## PERCENTAGE OF RESPONDENTS EMPLOYING THE FOLLOWING SECURITY PERSONNEL

| | | ANNUAL SALES IN MILLIONS | | | | | | | | NUMBER OF STORES | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | ALL COMPANIES | UNDER $10 | $11- $30 | $31- $100 | $101- $250 | $251- $500 | $501- $1 BIL | $1-$3 BILL | OVER $3 BILL | 1 | 2-10 | 11+ |
| TOTAL RESPONDENTS | 90 | 17 | 18 | 14 | 5 | 7 | 14 | 9 | 6 | 17 | 32 | 41 |
| STORE DETECTIVES | 64.4% | 41.2% | 50.0% | 71.4% | 60.0% | 85.7% | 85.7% | 88.9% | 50.0% | 41.2% | 56.3% | 80.5% |
| UNIFORMED COMPANY SECURITY GUARDS | 25.6 | 11.8 | 5.6 | 28.6 | 20.0 | 28.6 | 28.6 | 44.4 | 83.3 | 5.9 | 21.9 | 36.6 |
| UNIFORMED CONTRACT SECURITY GUARDS | 40.0 | 17.6 | 16.7 | 21.4 | 40.0 | 57.1 | 71.4 | 66.7 | 83.3 | 23.5 | 12.5 | 68.3 |
| UNIFORMED POLICE | 30.0 | 5.9 | 11.1 | 42.9 | 20.0 | 42.9 | 50.0 | 44.4 | 50.0 | 5.9 | 18.8 | 48.8 |
| MYSTERY SHOPPERS | 68.9 | 64.7 | 66.7 | 78.6 | 60.0 | 71.4 | 71.4 | 66.7 | 66.7 | 64.7 | 71.9 | 68.3 |

## TABLE 99B
## PERCENTAGE OF RESPONDENTS EMPLOYING THE FOLLOWING SECURITY PERSONNEL

| | | GEOGRAPHIC REGION OF HEADQUARTERS | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | ALL COMPANIES | NEW ENGLAND | MIDDLE ATLANTIC | EAST NORTH CENTRAL | WEST NORTH CENTRAL | SOUTH EAST | WEST SOUTH CENTRAL | MOUNTAIN | PACIFIC | CANADA |
| TOTAL RESPONDENTS | 90 | 9 | 12 | 18 | 7 | 17 | 7 | 6 | 12 | 2 |
| STORE DETECTIVES | 64.4% | 44.4% | 91.7% | 50.0% | 85.7% | 47.1% | 71.4% | 50.0% | 83.3% | |
| UNIFORMED COMPANY SECURITY GUARDS | 25.6 | 11.1 | 41.7 | 16.7 | 57.1 | 17.6 | 28.6 | - | 41.7 | |
| UNIFORMED CONTRACT SECURITY GUARDS | 40.0 | 22.2 | 50.0 | 44.4 | 57.1 | 29.4 | 71.4 | 16.7 | 33.3 | |
| UNIFORMED POLICE | 30.0 | 33.3 | 33.3 | 27.8 | 42.9 | 35.3 | 57.1 | - | 16.7 | |
| MYSTERY SHOPPERS | 68.9 | 77.8 | 83.3 | 55.6 | 71.4 | 58.8 | 85.7 | 66.7 | 66.7 | |

* MULTIPLE RESPONSES ALLOWED

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

### TABLE 100A

## PERCENTAGE OF COMPANIES WITH FORMAL LOSS PREVENTION MANUALS

| | | ANNUAL SALES IN MILLIONS | | | | | | | | NUMBER OF STORES | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | ALL COMPANIES | UNDER $10 | $11-$30 | $31-$100 | $101-$250 | $251-$500 | $501-$1 BIL | $1-$3 BILL | OVER $3 BILL | 1 | 2-10 | 11+ |
| TOTAL RESPONDENTS | 124 | 37 | 27 | 16 | 5 | 9 | 14 | 10 | 6 | 37 | 44 | 43 |
| HAVE LOSS PREVENTION MANUALS | 34.7% | 21.6% | 11.1% | 25.0% | 40.0% | 66.7% | 57.1% | 70.0% | 83.3% | 18.9% | 18.2% | 65.1% |
| DO NOT HAVE LOSS PREVENTION MANUALS | 65.3 | 78.4 | 88.9 | 75.0 | 60.0 | 33.3 | 42.9 | 30.0 | 16.7 | 81.1 | 81.8 | 34.9 |

### TABLE 100B

## PERCENTAGE OF COMPANIES WITH FORMAL LOSS PREVENTION MANUALS

| | | GEOGRAPHIC REGION OF HEADQUARTERS | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | ALL COMPANIES | NEW ENGLAND | MIDDLE ATLANTIC | EAST NORTH CENTRAL | WEST NORTH CENTRAL | SOUTH EAST | WEST SOUTH CENTRAL | MOUNTAIN | PACIFIC | CANADA |
| TOTAL RESPONDENTS | 124 | 13 | 16 | 26 | 10 | 29 | 8 | 7 | 13 | 2 |
| HAVE LOSS PREVENTION MANUALS | 34.7% | 7.7% | 43.8% | 19.2% | 40.0% | 34.5% | 50.0% | 42.9% | 69.2% | |
| DO NOT HAVE LOSS PREVENTION MANUALS | 65.3 | 92.3 | 56.3 | 80.8 | 60.0 | 65.5 | 50.0 | 57.1 | 30.8 | |

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

## TABLE 101A
# PERCENTAGE OF COMPANIES PROVIDING FORMAL LOSS PREVENTION TRAINING FOR:

| | | ANNUAL SALES IN MILLIONS | | | | | | | | NUMBER OF STORES | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | ALL COMPANIES | UNDER $10 | $11-$30 | $31-$100 | $101-$250 | $251-$500 | $501-$1 BIL | $1-$3 BILL | OVER $3 BILL | 1 | 2-10 | 11+ |
| TOTAL RESPONDENTS | 89 | 23 | 14 | 13 | 4 | 6 | 13 | 10 | 6 | 24 | 26 | 39 |
| STORE MANAGERS | 93.3% | 95.7% | 100.0% | 84.6% | 100.0% | 83.3% | 92.3% | 100.0% | 83.3% | 95.8% | 92.3% | 92.3% |
| WAREHOUSE AND DISTRIBUTION CENTER MANAGERS | 31.5 | 8.7 | - | 30.8 | 25.0 | 66.7 | 69.2 | 50.0 | 50.0 | 4.2 | 15.4 | 59.0 |
| STORE PERSONNEL BELOW THE LEVEL OF MANAGER | 59.6 | 43.5 | 50.0 | 53.8 | 25.0 | 83.3 | 84.6 | 80.0 | 66.7 | 41.7 | 53.8 | 74.4 |
| SECURITY GUARDS | 40.4 | 13.0 | 7.1 | 46.2 | 25.0 | 83.3 | 84.6 | 50.0 | 66.7 | 4.2 | 26.9 | 71.8 |

## TABLE 101B
# PERCENTAGE OF COMPANIES PROVIDING FORMAL LOSS PREVENTION TRAINING FOR:

| | | GEOGRAPHIC REGION OF HEADQUARTERS | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | ALL COMPANIES | NEW ENGLAND | MIDDLE ATLANTIC | EAST NORTH CENTRAL | WEST NORTH CENTRAL | SOUTH EAST | WEST SOUTH CENTRAL | MOUNTAIN | PACIFIC | CANADA |
| TOTAL RESPONDENTS | 89 | 5 | 12 | 17 | 9 | 22 | 7 | 6 | 9 | 2 |
| STORE MANAGERS | 93.3% | 100.0% | 91.7% | 100.0% | 88.9% | 95.5% | 85.7% | 100.0% | 77.8% | |
| WAREHOUSE AND DISTRIBUTION CENTER MANAGERS | 31.5 | - | 50.0 | 29.4 | 22.2 | 22.7 | 42.9 | - | 55.6 | |
| STORE PERSONNEL BELOW THE LEVEL OF MANAGER | 59.6 | 20.0 | 58.3 | 58.8 | 66.7 | 59.1 | 85.7 | 66.7 | 55.6 | |
| SECURITY GUARDS | 40.4 | - | 75.0 | 29.4 | 44.4 | 22.7 | 57.1 | 16.7 | 77.8 | |

* MULTIPLE RESPONSES ALLOWED

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

### TABLE 102A

# AVERAGE OF THE PERCENTAGE OF FORMAL TRAINING DONE IN THE FOLLOWING WAYS

| | | ANNUAL SALES IN MILLIONS | | | | | | | | NUMBER OF STORES | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | ALL COMPANIES | UNDER $10 | $11-$30 | $31-$100 | $101-$250 | $251-$500 | $501-$1 BIL | $1-$3 BILL | OVER $3 BILL | 1 | 2-10 | 11+ |
| TOTAL RESPONDENTS | 129 | 39 | 27 | 19 | 5 | 9 | 14 | 10 | 6 | 39 | 47 | 43 |
| IN-HOUSE CLASSROOM | 19.0% | 17.5% | 17.1% | 16.7% | 12.0% | 9.0% | 27.4% | 25.5% | 21.0% | 18.4% | 20.4% | 18.4% |
| OUT-OF-HOUSE CLASSROOM | 3.2 | 2.2 | 1.7 | 3.8 | 5.8 | 6.0 | 5.3 | 1.5 | 3.0 | 2.6 | 2.0 | 4.3 |
| ON-THE-JOB | 34.7 | 30.6 | 30.0 | 38.3 | 40.0 | 47.0 | 40.0 | 22.5 | 49.0 | 35.8 | 27.4 | 39.0 |
| MANUALS | 12.7 | 14.2 | 12.9 | 7.0 | 22.5 | 13.0 | 14.5 | 15.0 | 5.0 | 11.1 | 12.3 | 14.0 |
| SEMINARS, WORKSHOPS | 16.0 | 22.8 | 20.8 | 19.8 | 6.3 | 10.0 | 2.6 | 17.5 | 9.0 | 22.1 | 19.9 | 10.0 |
| MEETINGS | 13.5 | 12.8 | 13.3 | 14.3 | 13.5 | 15.0 | 9.2 | 18.0 | 13.0 | 10.0 | 15.7 | 14.0 |
| OTHER | .8 | 0 | 4.2 | .2 | 0 | 0 | 1.0 | 0 | 0 | 0 | 2.3 | .3 |

### TABLE 102B

# AVERAGE OF THE PERCENTAGE OF FORMAL TRAINING DONE IN THE FOLLOWING WAYS

| | | GEOGRAPHIC REGION OF HEADQUARTERS | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | ALL COMPANIES | NEW ENGLAND | MIDDLE ATLANTIC | EAST NORTH CENTRAL | WEST NORTH CENTRAL | SOUTH EAST | WEST SOUTH CENTRAL | MOUNTAIN | PACIFIC | CANADA |
| TOTAL RESPONDENTS | 129 | 14 | 16 | 27 | 11 | 30 | 8 | 8 | 13 | 2 |
| IN-HOUSE CLASSROOM | 19.0% | 5.0% | 11.5% | 21.5% | 6.4% | 27.1% | 34.2% | 3.3% | 19.2% | |
| OUT-OF-HOUSE CLASSROOM | 3.2 | 5.0 | 4.5 | 4.6 | 4.3 | 2.8 | 3.3 | 1.7 | .9 | |
| ON-THE-JOB | 34.7 | 27.5 | 45.0 | 29.2 | 41.4 | 31.9 | 20.8 | 35.0 | 41.7 | |
| MANUALS | 12.7 | 7.5 | 9.4 | 3.8 | 19.3 | 11.4 | 7.5 | 22.5 | 26.1 | |
| SEMINARS, WORKSHOPS | 16.0 | 50.0 | 18.7 | 21.2 | 18.6 | 10.3 | 20.0 | 22.5 | 1.7 | |
| MEETINGS | 13.5 | 5.0 | 10.7 | 15.8 | 10.0 | 16.5 | 14.2 | 15.0 | 10.4 | |
| OTHER | .8 | 0 | .2 | 3.8 | 0 | 0 | 0 | 0 | 0 | |

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

### TABLE 103A
## PERCENTAGE OF COMPANIES WITH A DRUG TESTING POLICY

| | | ANNUAL SALES IN MILLIONS | | | | | | | | NUMBER OF STORES | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | ALL COMPANIES | UNDER $10 | $11-$30 | $31-$100 | $101-$250 | $251-$500 | $501-$1 BIL | $1-$3 BILL | OVER $3 BILL | 1 | 2-10 | 11+ |
| TOTAL RESPONDENTS | 129 | 39 | 27 | 19 | 5 | 9 | 14 | 10 | 6 | 39 | 47 | 43 |
| RESPONDENTS WITH A DRUG TESTING POLICY | 17.8% | 5.1% | 3.7% | 5.3% | 20.0% | 22.2% | 42.9% | 70.0% | 50.0% | 5.1% | 4.3% | 44.2% |
| RESPONDENTS WITHOUT A DRUG TESTING POLICY | 82.2 | 94.9 | 96.3 | 94.7 | 80.0 | 77.8 | 57.1 | 30.0 | 50.0 | 94.9 | 95.7 | 55.8 |

### TABLE 103B
## PERCENTAGE OF COMPANIES WITH A DRUG TESTING POLICY

| | | GEOGRAPHIC REGION | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | ALL COMPANIES | NORTH EAST | MIDDLE ATLANTIC | EAST NORTH CENTRAL | WEST NORTH CENTRAL | SOUTH EAST | WEST SOUTH CENTRAL | MOUNTAIN | PACIFIC | CANADA |
| TOTAL RESPONDENTS | 129 | 14 | 16 | 27 | 11 | 30 | 8 | 8 | 13 | 2 |
| RESPONDENTS WITH A DRUG TESTING POLICY | 17.8% | - | 6.3% | 11.1% | 36.4% | 23.3% | 37.5% | 12.5% | 30.8% | |
| RESPONDENTS WITHOUT A DRUG TESTING POLICY | 82.2 | 100.0 | 93.8 | 88.9 | 63.6 | 76.7 | 62.5 | 87.5 | 69.2 | |

### TABLE 104
## PERCENTAGE OF COMPANIES HAVING A DRUG TESTING POLICY FOR:

| | ALL COMPANIES |
|---|---|
| TOTAL RESPONDENTS HAVING A DRUG TESTING POLICY | 23 |
| MANAGEMENT EMPLOYEES | 47.8% |
| TRUCK DRIVERS | 82.6 |
| STORE PERSONNEL BELOW THE LEVEL OF MANAGER | 47.8 |
| WAREHOUSE PERSONNEL BELOW THE LEVEL OF MANAGER | 73.9 |

* MULTIPLE RESPONSES ALLOWED

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

## TABLE 105
## PERCENTAGE OF COMPANIES USING DRUG TESTING FOR:

| | ALL COMPANIES |
|---|---|
| TOTAL RESPONDENTS HAVING A DRUG TESTING POLICY | 23 |
| PRE-EMPLOYMENT | 26.1% |
| "FOR CAUSE" i.e. FOLLOWING A SERIOUS ACCIDENT INVOLVING INJURIES OR HIGH MONETARY LOSSES | 21.7 |
| BOTH | 47.8 |
| RANDOM TESTING | 4.3 |

## TABLE 106A
## PERCENTAGE OF COMPANIES USING WRITTEN HONESTY TESTS

| | | ANNUAL SALES IN MILLIONS | | | | | | | | NUMBER OF STORES | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | ALL COMPANIES | UNDER $10 | $11-$30 | $31-$100 | $101-$250 | $251-$500 | $501-$1 BIL | $1-$3 BILL | OVER $3 BILL | 1 | 2-10 | 11+ |
| TOTAL RESPONDENTS | 126 | 39 | 26 | 17 | 5 | 9 | 14 | 10 | 6 | 39 | 44 | 43 |
| USE HONESTY TESTS | 30.2% | 20.5% | 23.1% | 41.2% | 60.0% | 44.4% | 21.4% | 50.0% | 33.3% | 23.1% | 29.5% | 37.2% |
| DO NOT USE HONESTY TESTS | 69.8 | 79.5 | 76.9 | 58.8 | 40.0 | 55.6 | 78.6 | 50.0 | 66.7 | 76.9 | 70.5 | 62.8 |

## TABLE 106B
## PERCENTAGE OF COMPANIES USING WRITTEN HONESTY TESTS

| | | GEOGRAPHIC REGION OF HEADQUARTERS | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | ALL COMPANIES | NEW ENGLAND | MIDDLE ATLANTIC | EAST NORTH CENTRAL | WEST NORTH CENTRAL | SOUTH EAST | WEST SOUTH CENTRAL | MOUNTAIN | PACIFIC | CANADA |
| TOTAL RESPONDENTS | 126 | 12 | 16 | 26 | 11 | 30 | 8 | 8 | 13 | 2 |
| USE HONESTY TESTS | 30.2% | 8.3% | 25.0% | 23.1% | 45.5% | 40.0% | 75.0% | 12.5% | 23.1% | |
| DO NOT USE HONESTY TESTS | 69.8 | 91.7 | 75.0 | 76.9 | 54.5 | 60.0 | 25.0 | 87.5 | 76.9 | |

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

## TABLE 107A

## PERCENTAGE OF COMPANIES USING WRITTEN HONESTY TESTS FOR THE FOLLOWING POSITIONS

| | | ANNUAL SALES IN MILLIONS | | | | | | | | NUMBER OF STORES | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | ALL COMPANIES | UNDER $10 | $11- $30 | $31- $100 | $101- $250 | $251- $500 | $501- $1 BIL | $1-$3 BILL | OVER $3 BILL | 1 | 2-10 | 11+ |
| TOTAL RESPONDENTS USING WRITTEN HONESTY TESTS | 36 | 8 | 6 | 6 | 3 | 4 | 3 | 4 | 2 | 9 | 12 | 15 |
| MANAGEMENT POSITIONS | 72.2% | 75.0% | 66.7% | 66.7% | | 100.0% | | 100.0% | | 55.6% | 83.3% | 73.3% |
| TRUCK DRIVERS | 25.0 | - | - | 33.3 | | 50.0 | | 50.0 | | - | 16.7 | 46.7 |
| STORE POSITIONS BELOW THE LEVEL OF MANAGER | 97.2 | 100.0 | 83.3 | 100.0 | | 100.0 | | 100.0 | | 100.0 | 91.7 | 100.0 |
| WAREHOUSE POSITIONS BELOW THE LEVEL OF MANAGER | 33.3 | 12.5 | 16.7 | 33.3 | | 50.0 | | 50.0 | | 22.2 | 16.7 | 53.3 |

## TABLE 107B

## PERCENTAGE OF COMPANIES USING WRITTEN HONESTY TESTS FOR THE FOLLOWING POSITIONS

| | | GEOGRAPHIC REGION OF HEADQUARTERS | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | ALL COMPANIES | NEW ENGLAND | MIDDLE ATLANTIC | EAST NORTH CENTRAL | WEST NORTH CENTRAL | SOUTH EAST | WEST SOUTH CENTRAL | MOUNTAIN | PACIFIC | CANADA |
| TOTAL RESPONDENTS USING WRITTEN HONESTY TESTS | 36 | 1 | 4 | 6 | 3 | 12 | 6 | 1 | 3 | 0 |
| MANAGEMENT POSITIONS | 72.2% | | 25.0% | 50.0% | | 83.3% | 100.0% | | | |
| TRUCK DRIVERS | 25.0 | | - | 16.7 | | 8.3 | 50.0 | | | |
| STORE POSITIONS BELOW THE LEVEL OF MANAGER | 97.2 | | 75.0 | 100.0 | | 100.0 | 100.0 | | | |
| WAREHOUSE POSITIONS BELOW THE LEVEL OF MANAGER | 33.3 | | 25.0 | 33.3 | | 16.7 | 50.0 | | | |

* MULTIPLE RESPONSES ALLOWED

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

### TABLE 108

# MEDIAN OF THE PERCENTAGE OF APPLICANTS BEING REJECTED THROUGH WRITTEN HONESTY TESTS

| | MEDIAN | MIDDLE RANGE | | NUMBER PARTICIPATING |
|---|---|---|---|---|
| ALL COMPANIES | 35.0% | 22.5% | 50.0% | 28 |
| COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS) | | | | |
| UNDER 10 | 25.0 | 15.0 | 35.0 | 6 |
| 10 - 30 | 45.0 | 27.5 | 50.0 | 4 |
| 31 - 100 | 32.5 | 15.0 | 50.0 | 6 |
| 101 - 250 | | | | 2 |
| 251 - 500 | | | | 2 |
| 500 - 1 BILLION | | | | 3 |
| 1-3 BILLION | 45.0 | 35.0 | 50.0 | 4 |
| OVER 3 BILLION | | | | 1 |
| GEOGRAPHIC REGION OF HEADQUARTERS | | | | |
| NEW ENGLAND | | | | 1 |
| MID ATLANTIC | | | | 2 |
| EAST NORTH CENTRAL | 35.0 | 5.0 | 40.0 | 6 |
| WEST NORTH CENTRAL | | | | 3 |
| SOUTHEAST | 45.0 | 20.0 | 60.0 | 10 |
| WEST SOUTH CENTRAL | 32.0 | 20.0 | 37.0 | 4 |
| MOUNTAIN | | | | 1 |
| PACIFIC | | | | 1 |
| CANADA | | | | 0 |
| NUMBER OF STORES | | | | |
| 1 STORE | 32.5 | 15.0 | 45.0 | 8 |
| 2 - 10 STORES | 40.0 | 20.0 | 50.0 | 9 |
| 11 + STORES | 35.0 | 30.0 | 50.0 | 11 |

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

## TABLE 109

# MEDIAN AMOUNT SPENT ON ALL SECURITY/LOSS PREVENTION COSTS PER STORE

| | MEDIAN | MIDDLE RANGE | | NUMBER PARTICIPATING |
|---|---|---|---|---|
| ALL COMPANIES | $5500 | $1000 | $18644 | 94 |
| COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS) | | | | |
| UNDER 10 | 1000 | 500 | 7500 | 21 |
| 10 - 30 | 1667 | 500 | 6667 | 21 |
| 31 - 100 | 10000 | 1200 | 25000 | 13 |
| 101 - 250 | 10500 | 6000 | 22222 | 5 |
| 251 - 500 | 20893 | 9615 | 27778 | 6 |
| 500 - 1 BILLION | 16949 | 4934 | 38706 | 13 |
| 1-3 BILLION | 9139 | 1282 | 21429 | 10 |
| OVER 3 BILLION | 11200 | 10395 | 11634 | 5 |
| GEOGRAPHIC REGION OF HEADQUARTERS | | | | |
| NEW ENGLAND | 5641 | 500 | 25000 | 8 |
| MID ATLANTIC | 13934 | 6667 | 29400 | 14 |
| EAST NORTH CENTRAL | 4934 | 1000 | 20000 | 21 |
| WEST NORTH CENTRAL | 2000 | 641 | 18644 | 7 |
| SOUTHEAST | 1728 | 984 | 4247 | 20 |
| WEST SOUTH CENTRAL | 9139 | 1885 | 507353 | 4 |
| MOUNTAIN | 500 | 0 | 14286 | 7 |
| PACIFIC | 10500 | 6000 | 32383 | 11 |
| CANADA | | | | 2 |
| NUMBER OF STORES | | | | |
| 1 STORE | 1000 | 500 | 10000 | 23 |
| 2 - 10 STORES | 2500 | 667 | 10800 | 33 |
| 11 + STORES | 12960 | 3571 | 27500 | 38 |

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

## TABLE 110
# MEDIAN OF THE PERCENTAGE OF ANNUAL SALES BUDGETED FOR SECURITY/LOSS PREVENTION

| | MEDIAN | MIDDLE RANGE | | NUMBER PARTICIPATING |
|---|---|---|---|---|
| ALL COMPANIES | .10% | .07% | .26% | 65 |
| COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS) | | | | |
| UNDER 10 | .05 | .01 | .10 | 12 |
| 10 - 30 | .10 | .10 | .50 | 14 |
| 31 - 100 | .15 | .10 | .25 | 8 |
| 101 - 250 | .06 | .01 | .20 | 4 |
| 251 - 500 | .24 | .20 | .26 | 5 |
| 500 - 1 BILLION | .10 | .02 | .20 | 10 |
| 1-3 BILLION | .10 | .04 | .50 | 7 |
| OVER 3 BILLION | .10 | .08 | .31 | 5 |
| GEOGRAPHIC REGION OF HEADQUARTERS | | | | |
| NEW ENGLAND | .10 | .06 | .10 | 4 |
| MID ATLANTIC | .13 | .10 | .28 | 11 |
| EAST NORTH CENTRAL | .10 | .02 | .30 | 11 |
| WEST NORTH CENTRAL | .10 | .10 | .50 | 7 |
| SOUTHEAST | .09 | .03 | .10 | 14 |
| WEST SOUTH CENTRAL | | | | 3 |
| MOUNTAIN | .35 | .11 | .90 | 4 |
| PACIFIC | .15 | .08 | .20 | 9 |
| CANADA | | | | 2 |
| NUMBER OF STORES | | | | |
| 1 STORE | .10 | .02 | .20 | 12 |
| 2 - 10 STORES | .10 | .10 | .30 | 23 |
| 11 + STORES | .10 | .04 | .26 | 30 |

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

### TABLE 111

## PERCENTAGE OF COMPANIES WITH THE FOLLOWING ITEMS INCLUDED IN THEIR SECURITY/LOSS PREVENTION BUDGET

| | | ANNUAL SALES | | NUMBER OF STORES | | |
|---|---|---|---|---|---|---|
| | ALL COMPANIES | UNDER $250 MILLION | $251 MILLION OR MORE | 1 | 2-10 | 11+ |
| TOTAL RESPONDENTS | 52 | 22 | 30 | 3 | 16 | 33 |
| SECURITY/LOSS PREVENTION PERSONNEL WAGES, FRINGES, AND EXPENSES ONLY | 71.2% | 68.2% | 73.3% | | 62.5% | 75.8% |
| THE ABOVE PLUS COSTS OF CLOSED CIRCUIT TELEVISION AND OTHER SECURITY EQUIPMENT PURCHASES AND MAINTENANCE COSTS | 51.9 | 31.8 | 66.7 | | 31.3 | 60.6 |

### TABLE 112

## PERCENTAGE OF COMPANIES APPLYING THE COSTS OF CONTRACT SECURITY GUARDS TO:

| | | ANNUAL SALES | | NUMBER OF STORES | | |
|---|---|---|---|---|---|---|
| | ALL COMPANIES | UNDER $250 MILLION | $251 MILLION OR MORE | 1 | 2-10 | 11+ |
| TOTAL RESPONDENTS | 44 | 14 | 30 | 2 | 11 | 31 |
| SECURITY/LOSS PREVENTION BUDGET | 31.8% | 21.4% | 36.7% | | 18.2% | 35.5% |
| INDIVIDUAL FACILITY | 61.4 | 71.4 | 56.7 | | 72.7 | 58.1 |
| BOTH | 6.8 | 7.1 | 6.7 | | 9.1 | 6.5 |

### TABLE 113

## PERCENTAGE OF COMPANIES APPLYING THE COSTS OF OFF-DUTY POLICE WAGES TO:

| | | ANNUAL SALES | | NUMBER OF STORES | | |
|---|---|---|---|---|---|---|
| | ALL COMPANIES | UNDER $250 MILLION | $251 MILLION OR MORE | 1 | 2-10 | 11+ |
| TOTAL RESPONDENTS | 37 | 11 | 26 | 1 | 9 | 27 |
| SECURITY/LOSS PREVENTION BUDGET | 21.6% | 9.1% | 26.9% | | - | 29.6% |
| INDIVIDUAL FACILITY | 73.0 | 81.8 | 69.2 | | 88.9 | 66.7 |
| BOTH | 5.4 | 9.1 | 3.8 | | 11.1 | 3.7 |

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

## TABLE 114
# PROFILE OF PARTICIPANTS - GEOGRAPHIC REGION OF WHOLESALE HEADQUARTERS

| | ALL WHOLESALE COMPANIES | 1988 WHOLESALE SALES (MILLIONS OF DOLLARS) | | | | WHOLESALE AFFILIATION | | | |
|---|---|---|---|---|---|---|---|---|---|
| | | UNDER $101 | $101-$250 | $251-$500 | OVER $500 | COOPERATIVE | VOLUNTARY | UN-AFFILIATED | COMBINED RETAIL/ WHOLESALE |
| TOTAL RESPONDENTS | 29 | 6 | 4 | 4 | 14 | 11 | 8 | 2 | 8 |
| NORTHEAST | 20.7 | 33.3 | - | 50.0 | 14.3 | 9.1 | 25.0 | 50.0 | 25.0 |
| SOUTH | 13.8 | - | 25.0 | 25.0 | 7.1 | 27.3 | 12.5 | - | - |
| NORTH CENTRAL | 31.0 | 16.7 | 25.0 | - | 50.0 | 18.2 | 50.0 | - | 37.5 |
| WEST | 3.4 | - | - | - | 7.1 | 9.1 | - | - | - |
| CANADA | 31.0 | 50.0 | 50.0 | 25.0 | 21.4 | 36.4 | 12.5 | 50.0 | 37.5 |

## TABLE 115
# TYPICAL PERCENT CHANGE IN WHOLESALE SALES: 1987 VS. 1988

| | MEDIAN | MIDDLE RANGE | | NUMBER PARTICIPATING |
|---|---|---|---|---|
| ALL COMPANIES | 4.6% | .7% | 11.1% | 29 |
| COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS) | | | | |
| UNDER $101 | 4.0 | 0 | 5.3 | 6 |
| $101 - $250 | 6.7 | -5.8 | 9.1 | 4 |
| $251 - $500 | 2.4 | .3 | 11.4 | 4 |
| OVER $500 | 6.5 | .9 | 12.3 | 14 |
| GEOGRAPHIC REGION OF STORES | | | | |
| NORTHEAST | .8 | 0 | 4.0 | 6 |
| SOUTH | 11.7 | 2.3 | 21.9 | 4 |
| NORTH CENTRAL | 8.0 | 5.1 | 11.2 | 9 |
| WEST | | | | 1 |
| CANADA | 8.7 | 3.9 | 9.5 | 9 |
| NUMBER OF STORES SERVED | | | | |
| UNDER 50 | 4.3 | 0 | 8.7 | 6 |
| 51 - 100 | | | | 3 |
| OVER 100 | 5.2 | .7 | 11.2 | 18 |

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

## TABLE 116
## PERCENTAGE OF ANNUAL SALES VOLUME ATTRIBUTED TO – SUMMARY OF MEANS

| | ALL WHOLESALE COMPANIES | 1988 WHOLESALE SALES (MILLIONS OF DOLLARS) | | | | WHOLESALE AFFILIATION | | | |
|---|---|---|---|---|---|---|---|---|---|
| | | UNDER $101 | $101-$250 | $251-$500 | OVER $500 | COOPERATIVE | VOLUNTARY | UNAFFILIATED | COMBINED RETAIL/WHOLESALE |
| TOTAL RESPONDENTS | 27 | 6 | 4 | 4 | 12 | 10 | 8 | 2 | 7 |
| INDEPENDENT FOOD STORES | 59.3% | 59.2% | 71.6% | 65.6% | 58.1% | 76.1% | 66.8% | | 34.4% |
| COMPANY OWNED STORES | 21.6 | 12.8 | 2.6 | 10.5 | 23.6 | 7.1 | 11.5 | | 53.5 |
| OTHER FOOD CHAINS | 12.9 | .8 | 7.1 | 23.0 | 12.5 | 7.4 | 18.9 | | 4.4 |
| CONVENIENCE STORES | 3.8 | 19.5 | 16.1 | 0 | 3.4 | 5.6 | 2.4 | | 3.5 |
| FOOD SERVICE/ INSTITUTIONAL | .4 | 3.1 | 2.6 | 0 | .3 | .8 | .1 | | .3 |
| OTHER | 2.0 | 4.6 | 0 | .9 | 2.2 | 3.0 | .2 | | 4.0 |

NOTE: DATA WEIGHTED BY 1988 SALES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

TABLE 117
# SERVICES PROVIDED TO MEMBERSHIP

| | | 1988 WHOLESALE SALES (MILLIONS OF DOLLARS) | | | | WHOLESALE AFFILIATION | | | |
|---|---|---|---|---|---|---|---|---|---|
| | ALL WHOLESALE COMPANIES | UNDER $101 | $101-$250 | $251-$500 | OVER $500 | COOPERATIVE | VOLUNTARY | UNAFFILIATED | COMBINED RETAIL/WHOLESALE |
| TOTAL RESPONDENTS | 29 | 6 | 4 | 4 | 14 | 11 | 8 | 2 | 8 |
| ADVERTISING PROGRAM | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | | 100.0% |
| INDIVIDUAL RETAIL PRICING | 93.1 | 83.3 | 100.0 | 100.0 | 92.9 | 100.0 | 100.0 | | 75.0 |
| REAL ESTATE & STORE ENGINEERING | 93.1 | 66.7 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | | 75.0 |
| INTERIOR DECOR & DESIGN | 93.1 | 66.7 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | | 75.0 |
| PRODUCT MOVEMENT DATA | 89.7 | 66.7 | 100.0 | 100.0 | 92.9 | 100.0 | 87.5 | | 75.0 |
| EQUIPMENT PROCUREMENT | 89.7 | 66.7 | 75.0 | 100.0 | 100.0 | 100.0 | 100.0 | | 62.5 |
| HANDLE PRIVATE LABEL | 89.7 | 66.7 | 100.0 | 100.0 | 100.0 | 90.9 | 87.5 | | 87.5 |
| SCANNING SUPPORT | 86.2 | 50.0 | 100.0 | 100.0 | 100.0 | 81.8 | 87.5 | | 87.5 |
| EDUCATION/TRAINING | 82.8 | 50.0 | 100.0 | 75.0 | 100.0 | 72.7 | 87.5 | | 87.5 |
| RETAIL ACCOUNTING | 82.8 | 50.0 | 100.0 | 100.0 | 92.9 | 81.8 | 75.0 | | 87.5 |
| GROSS MARGIN REPORT BY ITEM | 79.3 | 66.7 | 75.0 | 100.0 | 78.6 | 81.8 | 87.5 | | 62.5 |
| EQUIPMENT & FIXTURE FINANCING | 75.9 | 50.0 | 50.0 | 75.0 | 100.0 | 81.8 | 75.0 | | 62.5 |
| HANDLE GENERIC LABEL | 72.4 | 66.7 | 25.0 | 100.0 | 78.6 | 54.5 | 87.5 | | 87.5 |
| DISCOUNT PROGRAMS | 72.4 | 50.0 | 100.0 | 75.0 | 71.4 | 72.7 | 87.5 | | 50.0 |
| MEMBER PAYROLL | 69.0 | 16.7 | 75.0 | 100.0 | 85.7 | 63.6 | 75.0 | | 75.0 |
| DSD SYSTEM | 69.0 | 33.3 | 50.0 | 100.0 | 85.7 | 72.7 | 75.0 | | 62.5 |
| SPACE ALLOCATION | 65.5 | 33.3 | 50.0 | 100.0 | 78.6 | 63.6 | 100.0 | | 37.5 |
| LEASE FINANCING | 58.6 | 16.7 | 25.0 | 25.0 | 100.0 | 63.6 | 62.5 | | 62.5 |
| CENTRALIZED PRODUCT RECLAIM CENTER | 41.4 | - | - | 50.0 | 64.3 | 45.5 | 62.5 | | 25.0 |
| OTHER | 3.4 | - | - | - | 7.1 | - | - | | 12.5 |

MULTIPLE RESPONSES ALLOWED

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

## TABLE 118
## PROFILE OF RESPONDENTS - DISTRIBUTION CENTER VOLUME AT COST

| | ALL COMPANIES | RETAIL COMPANIES | WHOLESALE COMPANIES | COMBINED RETAIL/ WHOLESALE |
|---|---|---|---|---|
| TOTAL RESPONDENTS | 50 | 27 | 15 | 8 |
| VOLUME IN MILLIONS OF DOLLARS | | | | |
| LESS THAN $50 | 22.0% | 14.8% | 26.7% | 37.5% |
| $50 - $99 | 8.0 | 11.1 | - | 12.5 |
| $100 - $149 | 8.0 | 7.4 | 6.7 | 12.5 |
| $150 - $249 | 16.0 | 25.9 | 6.7 | - |
| OVER $250 | 46.0 | 40.7 | 60.0 | 37.5 |

## TABLE 119
## MEDIAN OF THE AVERAGE NUMBER OF SUPERMARKETS SERVED PER CENTER

| | MEDIAN | MIDDLE RANGE | | NUMBER PARTICIPATING |
|---|---|---|---|---|
| ALL COMPANIES | 70 | 36 | 146 | 53 |
| COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS) | | | | |
| UNDER $101 | 11 | 6 | 30 | 7 |
| $101 - $250 | 38 | 21 | 64 | 7 |
| $251 - $500 | 50 | 36 | 92 | 5 |
| OVER $500 | 110 | 59 | 170 | 34 |
| GEOGRAPHIC REGION OF STORES | | | | |
| NORTHEAST | 92 | 57 | 200 | 7 |
| SOUTH | 75 | 38 | 150 | 10 |
| NORTH CENTRAL | 77 | 50 | 118 | 18 |
| WEST | 93 | 43 | 132 | 6 |
| CANADA | 38 | 17 | 85 | 12 |
| NUMBER OF STORES SERVED | | | | |
| UNDER 50 | 12 | 10 | 26 | 5 |
| 51 - 100 | | | | 3 |
| OVER 100 | 200 | 80 | 250 | 17 |

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

### TABLE 120
# PROFILE OF RESPONDENTS - TOTAL DISTRIBUTION CENTER SQUARE FOOTAGE

| | MEDIAN | MIDDLE RANGE | | NUMBER PARTICIPATING |
|---|---|---|---|---|
| ALL COMPANIES | 355000 | 200000 | 500000 | 57 |
| COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS) | | | | |
| UNDER $101 | 100000 | 55000 | 125000 | 9 |
| $101 - $250 | 217000 | 125000 | 386000 | 7 |
| $251 - $500 | 200535 | 192000 | 312000 | 5 |
| OVER $500 | 440000 | 300666 | 650000 | 35 |
| GEOGRAPHIC REGION OF STORES | | | | |
| NORTHEAST | 355000 | 192000 | 404000 | 9 |
| SOUTH | 423500 | 300333 | 562500 | 12 |
| NORTH CENTRAL | 400906 | 250000 | 650000 | 18 |
| WEST | 264669 | 202000 | 388000 | 6 |
| CANADA | 144000 | 93833 | 408500 | 12 |
| NUMBER OF STORES SERVED | | | | |
| UNDER 50 | 158500 | 112500 | 402500 | 8 |
| 51 - 100 | | | | 3 |
| OVER 100 | 377000 | 279338 | 775000 | 17 |

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

## TABLE 121
## MEDIAN OF THE TOTAL NUMBER OF EMPLOYEES IN THE DISTRIBUTION CENTER

| | MEDIAN | MIDDLE RANGE | | NUMBER PARTICIPATING |
|---|---|---|---|---|
| TOTAL RESPONDENTS | 185 | 100 | 378 | 57 |
| ALL RETAILERS | 166 | 75 | 357 | 31 |
| ALL WHOLESALERS | 279 | 118 | 508 | 18 |
| COMBINED RETAILERS AND WHOLESALERS | 246 | 147 | 360 | 8 |
| CENTER VOLUME IN MILLIONS OF DOLLARS | | | | |
| LESS THAN $50 | 75 | 29 | 183 | 11 |
| $50 - $99 | 93 | 75 | 142 | 4 |
| $100 - $149 | 123 | 62 | 233 | 4 |
| $150 - $249 | 162 | 127 | 173 | 8 |
| OVER $250 | 377 | 270 | 426 | 22 |
| COMPANIES WITH MAJORITY OF EMPLOYEES UNIONIZED | 208 | 118 | 406 | 38 |
| COMPANIES WITH MAJORITY OF EMPLOYEES NON-UNIONIZED | 202 | 75 | 279 | 18 |

## TABLE 122
## MEDIAN OF THE NUMBER OF CASES SELECTED PER DIRECT LABOR HOUR

| | MEDIAN | MIDDLE RANGE | | NUMBER PARTICIPATING |
|---|---|---|---|---|
| TOTAL RESPONDENTS | 124 | 84 | 175 | 51 |
| ALL RETAILERS | 115 | 83 | 188 | 28 |
| ALL WHOLESALERS | 144 | 93 | 163 | 16 |
| COMBINED RETAILERS AND WHOLESALERS | 130 | 108 | 293 | 7 |
| CENTER VOLUME IN MILLIONS OF DOLLARS | | | | |
| LESS THAN $50 | 71 | 55 | 124 | 9 |
| $50 - $99 | | | | 3 |
| $100 - $149 | 197 | 77 | 288 | 4 |
| $150 - $249 | 178 | 120 | 210 | 8 |
| OVER $250 | 133 | 92 | 166 | 22 |
| COMPANIES WITH MAJORITY OF EMPLOYEES UNIONIZED | 116 | 84 | 165 | 36 |
| COMPANIES WITH MAJORITY OF EMPLOYEES NON-UNIONIZED | 132 | 94 | 180 | 14 |

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

### TABLE 123

## MEDIAN OF THE TOTAL SUPERVISOR, ADMINISTRATION, AND CLERICAL SALARIES AS A PERCENTAGE OF DISTRIBUTION CENTER VOLUME AT COST

| | MEDIAN | MIDDLE RANGE | | NUMBER PARTICIPATING |
|---|---|---|---|---|
| TOTAL RESPONDENTS | .3 | .1 | .6 | 39 |
| ALL RETAILERS | .3 | .1 | .4 | 22 |
| ALL WHOLESALERS | .4 | .2 | 1.6 | 12 |
| COMBINED RETAILERS AND WHOLESALERS | .3 | .3 | .9 | 5 |
| CENTER VOLUME IN MILLIONS OF DOLLARS | | | | |
| LESS THAN $50 | 1.3 | .4 | 2.4 | 6 |
| $50 - $99 | .6 | .2 | 1.3 | 4 |
| $100 - $149 | | | | 3 |
| $150 - $249 | .3 | .1 | .3 | 8 |
| OVER $250 | .3 | .1 | .4 | 18 |
| COMPANIES WITH MAJORITY OF EMPLOYEES UNIONIZED | .3 | .2 | .9 | 28 |
| COMPANIES WITH MAJORITY OF EMPLOYEES NON-UNIONIZED | .2 | .1 | .3 | 10 |

### TABLE 124

## MEDIAN OF THE TOTAL HOURLY WAGES AS A PERCENTAGE OF DISTRIBUTION CENTER VOLUME AT COST

| | MEDIAN | MIDDLE RANGE | | NUMBER PARTICIPATING |
|---|---|---|---|---|
| TOTAL RESPONDENTS | 1.5% | 1.0% | 2.3% | 39 |
| ALL RETAILERS | 1.3 | .9 | 1.6 | 22 |
| ALL WHOLESALERS | 1.7 | 1.2 | 3.0 | 12 |
| COMBINED RETAILERS AND WHOLESALERS | 2.1 | 1.8 | 2.4 | 5 |
| CENTER VOLUME IN MILLIONS OF DOLLARS | | | | |
| LESS THAN $50 | 6.1 | 2.0 | 24.0 | 6 |
| $50 - $99 | 1.9 | 1.4 | 2.4 | 4 |
| $100 - $149 | | | | 3 |
| $150 - $249 | 1.3 | 1.2 | 1.4 | 8 |
| OVER $250 | 1.6 | .9 | 2.1 | 18 |
| COMPANIES WITH MAJORITY OF EMPLOYEES UNIONIZED | 1.5 | 1.2 | 2.4 | 28 |
| COMPANIES WITH MAJORITY OF EMPLOYEES NON-UNIONIZED | 1.4 | .8 | 2.2 | 10 |

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

## TABLE 125

## MEDIAN OF THE PAYROLL TAXES AND FRINGE BENEFITS AS A PERCENTAGE OF DISTRIBUTION CENTER VOLUME AT COST

| | MEDIAN | MIDDLE RANGE | | NUMBER PARTICIPATING |
|---|---|---|---|---|
| TOTAL RESPONDENTS | .7% | .4% | .9% | 36 |
| ALL RETAILERS | .5 | .4 | .8 | 20 |
| ALL WHOLESALERS | .7 | .2 | 1.1 | 11 |
| COMBINED RETAILERS AND WHOLESALERS | .9 | .8 | .9 | 5 |
| CENTER VOLUME IN MILLIONS OF DOLLARS | | | | |
| LESS THAN $50 | 3.9 | .9 | 12.0 | 5 |
| $50 - $99 | .7 | .6 | .8 | 4 |
| $100 - $149 | | | | 2 |
| $150 - $249 | .5 | .4 | .8 | 8 |
| OVER $250 | .7 | .3 | .9 | 17 |
| COMPANIES WITH MAJORITY OF EMPLOYEES UNIONIZED | .7 | .4 | 1.1 | 26 |
| COMPANIES WITH MAJORITY OF EMPLOYEES NON-UNIONIZED | .4 | .3 | .8 | 9 |

## TABLE 126

## MEDIAN OF THE TOTAL PAYROLL COSTS AS A PERCENTAGE OF DISTRIBUTION CENTER VOLUME AT COST

| | MEDIAN | MIDDLE RANGE | | NUMBER PARTICIPATING |
|---|---|---|---|---|
| TOTAL RESPONDENTS | 2.3% | 1.6% | 3.6% | 40 |
| ALL RETAILERS | 1.8 | 1.2 | 3.0 | 22 |
| ALL WHOLESALERS | 3.0 | 1.6 | 5.4 | 12 |
| COMBINED RETAILERS AND WHOLESALERS | 3.2 | 3.0 | 3.4 | 6 |
| CENTER VOLUME IN MILLIONS OF DOLLARS | | | | |
| LESS THAN $50 | 5.3 | 1.7 | 38.4 | 7 |
| $50 - $99 | 3.3 | 2.5 | 4.1 | 4 |
| $100 - $149 | 1.2 | .5 | 1.8 | 3 |
| $150 - $249 | 2.1 | 1.8 | 2.5 | 8 |
| OVER $250 | 2.3 | 1.2 | 3.4 | 18 |
| COMPANIES WITH MAJORITY OF EMPLOYEES UNIONIZED | 2.3 | 1.6 | 4.7 | 29 |
| COMPANIES WITH MAJORITY OF EMPLOYEES NON-UNIONIZED | 2.0 | 1.2 | 3.3 | 10 |

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

## TABLE 127
## PERCENTAGE OF COMPANIES USING ENGINEERED LABOR STANDARDS

| | | CENTER VOLUME AT COST (MILLIONS OF DOLLARS) | | | | |
|---|---|---|---|---|---|---|
| | TOTAL | LESS THAN $50 | $50-$99 | $100 $149 | $150-$249 | OVER $250 |
| TOTAL RESPONDENTS | 61 | 11 | 4 | 4 | 8 | 23 |
| ALL RETAILERS | 52.5% | 36.4% | 75.0% | 50.0% | 87.5% | 47.8% |
| ALL WHOLESALERS | 34.4 | 36.4 | - | 25.0 | 12.5 | 39.1 |
| COMBINED RETAILERS AND WHOLESALERS | 13.1 | 27.3 | 25.0 | 25.0 | - | 13.0 |
| MAJORITY OF EMPLOYEES UNIONIZED | 67.2 | 72.7 | 50.0 | 75.0 | 62.5 | 78.3 |
| MAJORITY OF EMPLOYEES NON-UNIONIZED | 31.1 | 27.3 | 50.0 | 25.0 | 25.0 | 21.7 |

## TABLE 128
## USES OF ENGINEERED LABOR STANDARDS

| | | CENTER VOLUME AT COST (MILLIONS OF DOLLARS) | | | | |
|---|---|---|---|---|---|---|
| | TOTAL | LESS THAN $50 | $50-$99 | $100 $149 | $150-$249 | OVER $250 |
| TOTAL RESPONDENTS WHO HAVE ENGINEERED LABOR STANDARDS | 37 | 6 | 2 | 3 | 7 | 16 |
| PLAN SHIFTS | 73.0% | 66.7% | | | 85.7% | 75.0% |
| TRACK INDIVIDUAL PRODUCTIVITY | 91.9 | 66.7 | | | 100.0 | 93.8 |
| TRACK AREA PRODUCTIVITY | 70.3 | 83.3 | | | 85.7 | 68.8 |
| TRACK SHIFT PRODUCTIVITY | 73.0 | 50.0 | | | 85.7 | 75.0 |

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

## TABLE 129
## USES OF ENGINEERED LABOR STANDARDS

| | COMPANIES | RETAILERS | WHOLESALERS | COMBINED RETAIL/ WHOLESALE | MAJORITY OF EMPLOYEES: UNIONIZED | MAJORITY OF EMPLOYEES: NON-UNIONIZED |
|---|---|---|---|---|---|---|
| TOTAL RESPONDENTS WHO HAVE ENGINEERED LABOR STANDARDS | 37 | 20 | 12 | 5 | 27 | 9 |
| PLAN SHIFTS | 73.0% | 85.0% | 50.0% | 80.0% | 77.8% | 55.6% |
| TRACK INDIVIDUAL PRODUCTIVITY | 91.9 | 95.0 | 91.7 | 80.0 | 88.9 | 100.0 |
| TRACK AREA PRODUCTIVITY | 70.3 | 75.0 | 66.7 | 60.0 | 70.4 | 66.7 |
| TRACK SHIFT PRODUCTIVITY | 73.0 | 85.0 | 50.0 | 80.0 | 77.8 | 55.6 |

## TABLE 130
## MEDIAN NUMBER OF YEARS THE STANDARDS HAVE BEEN IN EFFECT

| | MEDIAN | MIDDLE RANGE | | NUMBER PARTICIPATING |
|---|---|---|---|---|
| TOTAL RESPONDENTS WHO HAVE ENGINEERED LABOR STANDARDS | 5 | 4 | 12 | 35 |
| ALL RETAILERS | 5 | 3 | 11 | 19 |
| ALL WHOLESALERS | 7 | 5 | 15 | 11 |
| COMBINED RETAILERS AND WHOLESALERS | 5 | 2 | 15 | 5 |
| CENTER VOLUME IN MILLIONS OF DOLLARS | | | | |
| LESS THAN $50 | 12 | 6 | 20 | 6 |
| $50 - $99 | | | | 2 |
| $100 - $149 | | | | 3 |
| $150 - $249 | 4 | 3 | 11 | 7 |
| OVER $250 | 7 | 5 | 12 | 14 |
| COMPANIES WITH MAJORITY OF EMPLOYEES UNIONIZED | 5 | 4 | 11 | 25 |
| COMPANIES WITH MAJORITY OF EMPLOYEES NON-UNIONIZED | 9 | 4 | 15 | 9 |

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

## TABLE 131
## PERCENTAGE OF COMPANIES USING QUALITY CIRCLES

| | | CENTER VOLUME AT COST (MILLIONS OF DOLLARS) | | | | |
|---|---|---|---|---|---|---|
| | TOTAL | LESS THAN $50 | $50-$99 | $100 $149 | $150-$249 | OVER $250 |
| TOTAL RESPONDENTS | 59 | 11 | 4 | 4 | 8 | 23 |
| PERCENTAGE OF COMPANIES WITH QUALITY CIRCLES | 32.2% | 27.3% | - | 50.0% | 37.5% | 39.1% |

## TABLE 132
## PERCENTAGE OF COMPANIES USING QUALITY CIRCLES

| | | | | | MAJORITY OF EMPLOYEES: | |
|---|---|---|---|---|---|---|
| | COMPANIES | RETAILERS | WHOLESALERS | COMBINED RETAIL/ WHOLESALE | UNIONIZED | NON-UNIONIZED |
| TOTAL RESPONDENTS | 59 | 31 | 20 | 8 | 41 | 17 |
| PERCENTAGE OF COMPANIES WITH QUALITY CIRCLES | 32.2% | 32.3% | 30.0% | 37.5% | 36.6% | 23.5% |

## TABLE 133
## MEDIAN NUMBER OF YEARS QUALITY CIRCLES HAVE BEEN IN USE

| | MEDIAN | MIDDLE RANGE | | NUMBER PARTICIPATING |
|---|---|---|---|---|
| TOTAL RESPONDENTS WHO HAVE QUALITY CIRCLES | 5 | 2 | 7 | 19 |
| ALL RETAILERS | 5 | 3 | 7 | 10 |
| ALL WHOLESALERS | 4 | 2 | 6 | 6 |
| COMBINED RETAILERS AND WHOLESALERS | | | | 3 |
| CENTER VOLUME IN MILLIONS OF DOLLARS | | | | |
| LESS THAN $50 | | | | 3 |
| $50 - $99 | | | | 0 |
| $100 - $149 | | | | 2 |
| $150 - $249 | | | | 3 |
| OVER $250 | 6 | 5 | 8 | 9 |
| COMPANIES WITH MAJORITY OF EMPLOYEES UNIONIZED | 5 | 3 | 7 | 15 |
| COMPANIES WITH MAJORITY OF EMPLOYEES NON-UNIONIZED | 3 | 2 | 5 | 4 |

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 198

### TABLE 134
## PERCENTAGE OF COMPANIES OPERATING AN EMPLOYEE ASSISTANCE PROGRAM (EAP)

| | | CENTER VOLUME AT COST (MILLIONS OF DOLLARS) | | | | |
|---|---|---|---|---|---|---|
| | TOTAL | LESS THAN $50 | $50-$99 | $100 $149 | $150-$249 | OVER $250 |
| TOTAL RESPONDENTS | 61 | 11 | 4 | 4 | 8 | 23 |
| PERCENTAGE OF COMPANIES WITH AN EAP | 47.5% | 36.4% | - | 75.0% | 37.5% | 73.9% |

### TABLE 135
## PERCENTAGE OF COMPANIES OPERATING AN EMPLOYEE ASSISTANCE PROGRAM (EAP)

| | | | | | MAJORITY OF EMPLOYEES: | |
|---|---|---|---|---|---|---|
| | COMPANIES | RETAILERS | WHOLESALERS | COMBINED RETAIL/ WHOLESALE | UNIONIZED | NON-UNIONIZED |
| TOTAL RESPONDENTS | 61 | 32 | 21 | 8 | 41 | 19 |
| PERCENTAGE OF COMPANIES WITH AN EAP | 47.5% | 40.6% | 52.4% | 62.5% | 51.2% | 42.1% |

### TABLE 136
## TYPES OF EMPLOYEE ASSISTANCE PROGRAMS

| | | CENTER VOLUME AT COST (MILLIONS OF DOLLARS) | | | | |
|---|---|---|---|---|---|---|
| | TOTAL | LESS THAN $50 | $50-$99 | $100 $149 | $150-$249 | OVER $250 |
| TOTAL RESPONDENTS WITH AN EMPLOYEE ASSISTANCE PROGRAM | 29 | 4 | 0 | 3 | 3 | 17 |
| PERCENTAGE OF EAPs OPERATED: | | | | | | |
| WITHIN THE COMPANY | 41.4% | - | | | | 52.9% |
| OUTSIDE THE COMPANY | 72.4 | 100.0 | | | | 64.7 |
| PERCENTAGE OF EAPs THAT ARE: | | | | | | |
| FOR ALCOHOL AND DRUGS ONLY | 24.1 | - | | | | 29.4 |
| A "BROADBRUSH" OR GENERAL PROGRAM | 75.9 | 100.0 | | | | 70.6 |

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

## TABLE 137
## TYPES OF EMPLOYEE ASSISTANCE PROGRAMS

| | COMPANIES | RETAILERS | WHOLESALERS | COMBINED RETAIL/ WHOLESALE | MAJORITY OF EMPLOYEES: UNIONIZED | MAJORITY OF EMPLOYEES: NON-UNIONIZED |
|---|---|---|---|---|---|---|
| TOTAL RESPONDENTS WITH AN EMPLOYEE ASSISTANCE PROGRAM | 29 | 13 | 11 | 5 | 21 | 8 |
| PERCENTAGE OF EAPs OPERATED: | | | | | | |
| WITHIN THE COMPANY | 41.4% | 38.5% | 45.5% | 40.0% | 42.9% | 37.5% |
| OUTSIDE THE COMPANY | 72.4 | 69.2 | 63.6 | 100.0 | 76.2 | 62.5 |
| PERCENTAGE OF EAPs THAT ARE: | | | | | | |
| FOR ALCOHOL AND DRUGS ONLY | 24.1 | 30.8 | 27.3 | - | 33.3 | - |
| A "BROADBRUSH" OR GENERAL PROGRAM | 75.9 | 69.2 | 72.7 | 100.0 | 66.7 | 100.0 |

## TABLE 138
## AVAILABILITY OF EMPLOYEE ASSISTANCE PROGRAMS

| | | CENTER VOLUME AT COST (MILLIONS OF DOLLARS) | | | | |
|---|---|---|---|---|---|---|
| | TOTAL | LESS THAN $50 | $50-$99 | $100 $149 | $150-$249 | OVER $250 |
| TOTAL RESPONDENTS WITH EAPS | 29 | 4 | 0 | 3 | 3 | 17 |
| PERCENTAGE WITH PROGRAMS AVAILABLE TO FULL-TIME EMPLOYEES ONLY | 31.0% | 25.0% | | | | 23.5% |
| PERCENTAGE WITH PROGRAMS AVAILABLE TO ALL EMPLOYEES | 62.1 | 50.0 | | | | 70.6 |

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

### TABLE 139
## AVAILABILITY OF EMPLOYEE ASSISTANCE PROGRAMS

| | | | | | MAJORITY OF EMPLOYEES: | |
|---|---|---|---|---|---|---|
| | COMPANIES | RETAILERS | WHOLESALERS | COMBINED RETAIL/ WHOLESALE | UNIONIZED | NON-UNIONIZED |
| TOTAL RESPONDENTS WITH EAPS | 29 | 13 | 11 | 5 | 21 | 8 |
| PERCENTAGE WITH PROGRAMS AVAILABLE TO FULL-TIME EMPLOYEES ONLY | 31.0% | 38.5% | 27.3% | 20.0% | 23.8% | 50.0% |
| PERCENTAGE WITH PROGRAMS AVAILABLE TO ALL EMPLOYEES | 62.1 | 53.8 | 63.6 | 80.0 | 66.7 | 50.0 |

### TABLE 140
## FUTURE EAP PROGRAMS

| | | CENTER VOLUME AT COST (MILLIONS OF DOLLARS) | | | | |
|---|---|---|---|---|---|---|
| | TOTAL | LESS THAN $50 | $50-$99 | $100 $149 | $150-$249 | OVER $250 |
| TOTAL RESPONDENTS WITHOUT EAPS IN 1988 | 32 | 7 | 4 | 1 | 5 | 6 |
| PERCENTAGE INTENDING TO IMPLEMENT AN EAP PROGRAM IN THE NEXT 12 MONTHS | 15.6% | 14.3% | - | | 20.0% | 16.7% |
| PERCENTAGE INTENDING TO IMPLEMENT AN EAP PROGRAM IN THE NEXT 24 MONTHS | - | - | - | | - | - |
| PERCENTAGE NOT INTENDING TO IMPLEMENT AN EAP PROGRAM | 6.3 | 14.3 | - | | - | 16.7 |

### TABLE 141
## FUTURE EAP PROGRAMS

| | | | | | MAJORITY OF EMPLOYEES: | |
|---|---|---|---|---|---|---|
| | COMPANIES | RETAILERS | WHOLESALERS | COMBINED RETAIL/ WHOLESALE | UNIONIZED | NON-UNIONIZED |
| TOTAL RESPONDENTS WITHOUT EAPS IN 1988 | 32 | 19 | 10 | 3 | 20 | 11 |
| PERCENTAGE INTENDING TO IMPLEMENT AN EAP PROGRAM IN THE NEXT 12 MONTHS | 15.6% | 10.5% | 30.0% | | 20.0% | 9.1% |
| PERCENTAGE INTENDING TO IMPLEMENT AN EAP PROGRAM IN THE NEXT 24 MONTHS | - | - | - | | - | - |
| PERCENTAGE NOT INTENDING TO IMPLEMENT AN EAP PROGRAM | 6.3 | 5.3 | 10.0 | | 5.0 | 9.1 |

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

## TABLE 142
## PERCENTAGE OF COMPANIES WITH DRUG TESTING PROGRAMS

| | | CENTER VOLUME AT COST (MILLIONS OF DOLLARS) | | | | |
|---|---|---|---|---|---|---|
| | TOTAL | LESS THAN $50 | $50-$99 | $100 $149 | $150-$249 | OVER $250 |
| TOTAL RESPONDENTS | 48 | 7 | 3 | 2 | 8 | 19 |
| PERCENTAGE OF COMPANIES WITH A DRUG TESTING POLICY FOR: | | | | | | |
| DISTRIBUTION CENTER MANAGEMENT | 37.5% | 28.6% | | | 25.0% | 47.4% |
| WAREHOUSE PERSONNEL BELOW THE LEVEL OF MANAGEMENT | 54.2 | 28.6 | | | 50.0 | 68.4 |
| TRUCK DRIVERS | 56.3 | 28.6 | | | 37.5 | 78.9 |

## TABLE 143
## PERCENTAGE OF COMPANIES WITH DRUG TESTING PROGRAMS

| | | | | | MAJORITY OF EMPLOYEES: | |
|---|---|---|---|---|---|---|
| | COMPANIES | RETAILERS | WHOLESALERS | COMBINED RETAIL/ WHOLESALE | UNIONIZED | NON-UNIONIZED |
| TOTAL RESPONDENTS | 48 | 28 | 15 | 5 | 30 | 17 |
| PERCENTAGE OF COMPANIES WITH A DRUG TESTING POLICY FOR: | | | | | | |
| DISTRIBUTION CENTER MANAGEMENT | 37.5% | 32.1% | 53.3% | 20.0% | 36.7% | 41.2% |
| WAREHOUSE PERSONNEL BELOW THE LEVEL OF MANAGEMENT | 54.2 | 50.0 | 73.3 | 20.0 | 60.0 | 47.1 |
| TRUCK DRIVERS | 56.3 | 53.6 | 73.3 | 20.0 | 60.0 | 52.9 |

## TABLE 144
## PERCENTAGE OF COMPANIES WITH SUCH A POLICY

| | | CENTER VOLUME AT COST (MILLIONS OF DOLLARS) | | | | |
|---|---|---|---|---|---|---|
| | TOTAL | LESS THAN $50 | $50-$99 | $100 $149 | $150-$249 | OVER $250 |
| TOTAL RESPONDENTS WITH A DRUG TESTING POLICY | 29 | 2 | 0 | 2 | 4 | 15 |
| PRE-EMPLOYMENT | 37.9% | | | | 75.0% | 20.0% |
| "FOR CAUSE" i.e. FOLLOWING A SERIOUS ACCIDENT INVOLVING INJURIES OR HIGH MONETARY LOSSES | 13.8 | | | | 25.0 | 6.7 |
| BOTH | 48.3 | | | | - | 73.3 |

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

### TABLE 145
## PERCENTAGE OF COMPANIES WITH SUCH A POLICY

|  |  |  |  |  | MAJORITY OF EMPLOYEES: |  |
|---|---|---|---|---|---|---|
|  | COMPANIES | RETAILERS | WHOLESALERS | COMBINED RETAIL/ WHOLESALE | UNIONIZED | NON-UNIONIZED |
| TOTAL RESPONDENTS WITH A DRUG TESTING POLICY | 29 | 16 | 12 | 1 | 20 | 9 |
| PRE-EMPLOYMENT | 37.9% | 31.3% | 41.7% |  | 50.0% | 11.1% |
| "FOR CAUSE" i.e. FOLLOWING A SERIOUS ACCIDENT INVOLVING INJURIES OR HIGH MONETARY LOSSES | 13.8 | 6.3 | 25.0 | - | 10.0 | 22.2 |
| BOTH | 48.3 | 62.5 | 33.3 | - | 40.0 | 66.7 |

### TABLE 146
## PERCENTAGE OF COMPANIES THAT TRAIN IN PROPER LIFTING TECHNIQUES

|  |  | CENTER VOLUME AT COST (MILLIONS OF DOLLARS) |  |  |  |  |
|---|---|---|---|---|---|---|
|  | TOTAL | LESS THAN $50 | $50-$99 | $100 $149 | $150-$249 | OVER $250 |
| TOTAL RESPONDENTS | 48 | 7 | 3 | 2 | 8 | 19 |
| PERCENTAGE OF COMPANIES THAT TRAIN IN PROPER LIFTING TECHNIQUES | 75.0% | 57.1% |  |  | 62.5% | 84.2% |

### TABLE 147
## PERCENTAGE OF COMPANIES THAT TRAIN IN PROPER LIFTING TECHNIQUES

|  |  |  |  |  | MAJORITY OF EMPLOYEES: |  |
|---|---|---|---|---|---|---|
|  | COMPANIES | RETAILERS | WHOLESALERS | COMBINED RETAIL/ WHOLESALE | UNIONIZED | NON-UNIONIZED |
| TOTAL RESPONDENTS | 48 | 28 | 15 | 5 | 30 | 17 |
| PERCENTAGE OF COMPANIES THAT TRAIN IN PROPER LIFTING TECHNIQUES | 75.0% | 75.0% | 86.7% | 40.0% | 83.3% | 64.7% |

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

## TABLE 148
## PERCENTAGE OF COMPANIES WITH A WAREHOUSE BASED RECYCLING PROGRAM

| | | CENTER VOLUME AT COST (MILLIONS OF DOLLARS) | | | | |
|---|---|---|---|---|---|---|
| | TOTAL | LESS THAN $50 | $50-$99 | $100 $149 | $150-$249 | OVER $250 |
| TOTAL RESPONDENTS | 45 | 7 | 3 | 2 | 8 | 16 |
| PERCENTAGE OF COMPANIES WITH A WAREHOUSE BASED RECYCLING PROGRAM | 64.4% | 85.7% | 33.3% | 50.0% | 75.0% | 62.5% |

## TABLE 149
## PERCENTAGE OF COMPANIES WITH A WAREHOUSE BASED RECYCLING PROGRAM

| | | | | | MAJORITY OF EMPLOYEES: | |
|---|---|---|---|---|---|---|
| | COMPANIES | RETAILERS | WHOLESALERS | COMBINED RETAIL/ WHOLESALE | UNIONIZED | NON-UNIONIZED |
| TOTAL RESPONDENTS | 45 | 27 | 13 | 5 | 27 | 17 |
| PERCENTAGE OF COMPANIES WITH A WAREHOUSE BASED RECYCLING PROGRAM | 64.4% | 74.1% | 46.2% | 60.0% | 63.0% | 64.7% |

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1989

TABLE 150

## OPERATING RESULTS

**(Current & Historical)**

| | 1980 | 1981 | 1982 | 1983 | 1984 | 1985 | 1986 | 1987 | 1988 |
|---|---|---|---|---|---|---|---|---|---|
| **Profit** | | | | | | | | | |
| Gross Profit with Warehouse | 22.4% | 23.0% | 23.4% | 23.7% | 24.1% | 24.0% | 23.6% | 23.9% | 23.9% |
| Gross Profit without Warehouse | 20.9 | 20.9 | 21.2 | 21.5 | 21.6 | 22.3 | 21.3 | 22.6 | 22.2 |
| Net Profit (before taxes) | 1.5 | 1.4 | 1.5 | 1.0 | 1.6 | 1.8 | 1.7 | 1.6 | 1.2 |
| **Expenses** | | | | | | | | | |
| Store Labor | 8.4 | 8.5 | 8.8 | 8.8 | 8.9 | 8.6 | 8.8 | 8.6 | 8.7 |
| Fringe Benefits | 1.9 | 2.0 | 2.1 | 2.2 | 2.3 | 2.3 | 2.2 | 2.5 | 2.3 |

Source: Operations Review 1979-1987

TABLE 151

## PERCENTAGE OF DISPOSABLE INCOME SPENT ON FOOD

| | OLD METHOD* | | | NEW METHOD* | | |
|---|---|---|---|---|---|---|
| | All Food | Food at Home | Food Away from Home | All Food | Food at at Home | Food Away from Home |
| 1985 | 14.8% | 10.2% | 4.6% | 12.7% | 8.3% | 4.4% |
| 1985 | 14.7% | 10.7% | 4.6% | 12.5% | 8.1% | 4.4% |
| 1986 | 14.5% | 9.9% | 4.6% | 12.2% | 7.8% | 4.4% |
| 1987 | 14.3% | 9.6% | 4.7% | 12.1% | 7.6% | 4.5% |
| 1988 | — | — | — | 11.8% | 7.3% | 4.5% |

SOURCE: U.S. Department of Agriculture

* The USDA changed its calculation of the Percentage of Disposable Income Spent on Food to reflect the amount of non-foods sold in supermarkets. The new figures for Food at Home and All Food are about two percentage points lower than the old.

TABLE 152

# CONSUMER PRICE INDEX*

**Annual Average**

| | ALL ITEMS | | FOOD AT HOME | | FOOD AWAY FROM HOME | |
|---|---|---|---|---|---|---|
| | C.P.I. | Percent Change | C.P.I. | Percent Change | C.P.I. | Percent Change |
| 1988 | 118.3 | 4.1% | 116.6 | 4.2% | 121.8 | 4.1% |
| 1987 | 113.6 | 3.7 | 111.9 | 4.3 | 117.0 | 4.0 |
| 1986 | 109.6 | 1.9 | 107.3 | 2.9 | 112.5 | 3.9 |
| 1985 | 107.6 | 3.6 | 104.3 | 1.4 | 108.3 | 4.0 |
| 1984 | 103.9 | 4.3 | 102.8 | 3.7 | 104.2 | 4.2 |
| 1983 | 99.6 | 3.2 | 99.1 | 1.1 | 100.0 | 4.4 |
| 1982 | 96.5 | 6.1 | 98.1 | 3.4 | 95.8 | 5.3 |
| 1981 | 90.9 | 10.4 | 94.8 | 7.3 | 90.9 | 9.0 |
| 1980 | 82.4 | 13.5 | 88.4 | 8.0 | 83.4 | 9.9 |
| 1979 | 72.6 | 11.3 | 81.8 | 10.8 | 75.9 | 11.2 |

* 1982 = 100

Source: Consumer Price Index
Detailed Report for December
U.S. Department of Labor
Bureau of Labor Statistics

TABLE 153

# HISTORICAL DATA

| Median Percent Change in Retail Sales | |
|---|---|
| 1987 vs. 1988 | 6.9% |
| 1986 vs. 1987 | 5.5 |
| 1985 vs. 1986 | 5.5 |
| 1984 vs. 1985 | 5.0 |
| 1983 vs. 1984 | 7.3 |
| 1982 vs. 1983 | 7.6 |
| 1981 vs. 1982 | 8.7 |
| 1980 vs. 1981 | 9.3 |
| 1979 vs. 1980 | 14.1 |

| Median Percent Change in Retail Sales-Identical Stores | |
|---|---|
| 1987 vs. 1988 | 5.5% |
| 1986 vs. 1987 | 4.0% |
| 1985 vs. 1986 | 4.3 |
| 1984 vs. 1985 | 3.6 |
| 1983 vs. 1984 | 5.6 |
| 1982 vs. 1983 | 6.1 |
| 1981 vs. 1982 | 7.7 |
| 1980 vs. 1981 | 8.1 |
| 1979 vs. 1980 | 11.4 |

| Median Weekly Store Sales | |
|---|---|
| 1988 | $210,770 |
| 1987 | 184,210 |
| 1986 | 171,936 |
| 1985 | 164,408 |
| 1984 | 140,016 |
| 1983 | 122,265 |
| 1982 | 143,678 |
| 1981 | 126,564 |
| 1980 | 110,000 |

| Median Weekly Sales Per Square Foot | |
|---|---|
| 1988 | $9.50 |
| 1987 | 8.80 |
| 1986 | 7.88 |
| 1985 | 8.43 |
| 1984 | 8.00 |
| 1983 | 6.95 |
| 1982 | 7.90 |
| 1981 | 6.75 |
| 1980 | 6.94 |

| Median Sales Per Transaction | |
|---|---|
| 1988 | $16.80 |
| 1987 | 16.30 |
| 1986 | 16.04 |
| 1985 | 16.33 |
| 1984 | 15.36 |
| 1983 | 14.60 |
| 1982 | 14.33 |
| 1981 | 14.23 |
| 1980 | 12.10 |

| Average Number of Items in a Supermarket | |
|---|---|
| 1988 | 26,430 |
| 1987 | 24,531 |
| 1986 | 19,857 |
| 1985 | 17,459 |
| 1984 | 15,379 |
| 1983 | 16,719 |
| 1982 | 13,067 |
| 1981 | 12,877 |
| 1980 | 14,145 |

# Definitions

| | |
|---|---|
| **Chain** | Retailers with eleven (11) or more supermarkets. |
| **Delivery Cost** | The total amount of delivery expense charged to the retail store operation, including salaries, fringe benefits including payroll taxes, equipment depreciation and rental, taxes and licenses, insurance, repairs, gas and oil, and operating supplies. |
| **Fringe Benefits** | The company's share of payroll taxes (including those payable under the Federal Insurance Contribution Act, state and federal unemployment compensation, Workers' Compensation), holiday and vacation pay, group insurance, pension, profit sharing, retirement, severance pay, and bonus unless it is a significant amount paid on a regular, recurring basis. |
| **Identical Stores** | Supermarkets in operation throughout the entire two-year period, 1987 and 1988. |
| **Independent** | Retailers with ten (10) or fewer supermarkets. |
| **Scratch Rate** | Percentage of items ordered from the distribution center but not shipped to the store. |
| **Selling Area** | Customer area of the store. |
| **Shortage (Shrink)** | Computed using the "retail method," it includes all inventory shortages, including disappearance, spoilage and damaged merchandise for which there is no supplier reimbursement. Shrink is reported at retail value as a percent of sales. |
| **Store Door Margin** | Gross profit after any wholesaler's fees minus warehouse, delivery, and headquarter's cost are deducted. |
| **Store Labor Expense** | The payment to all store personnel including the store manager, for straight and overtime wages and regular recurring bonus payments. Payments for sickness, absence, excused time off, training and commissions are included in this figure. |
| **Store Rent and Real Estate** | Rent paid for store building and parking lot, real estate taxes and insurance and amortization of lease-hold improvement. |
| **Store Supplies** | The expense incurred for checkout, wrapping and prepackaging supplies and maintenance supplies for cleaning, window washing, etc. |
| **Supermarket** | A retail food store with annual sales of at least $2 million a year.<br>Conventional Supermarkets (under 30,000 total sq. ft.).<br>Super Stores (over 30,000 total sq. ft., expanded food and non-food selection).<br>Combination Stores (over 30,000 total sq. ft. and at least 25% of area in General Merchandise). |

Limited Assortment Stores (carries less than 1000 items and offers few if any perishables with a "no frills" shopping environment).

Warehouse Stores (uses utilitarian fixtures and emphasizes lowered prices at the expense of customer service).

**Utilities Expense** The cost for heating, light, water and power.

**Warehouse Cost** The total amount of warehouse expense charged to the retail store operation, including such items as salaries, fringe benefits, warehouse rental, equipment rental or depreciation, utility cost and supplies.

**Wholesaler** A company which reported wholesale sales in 1984 to supermarkets, institutions and/or businesses other than those owned by the company and primarily engaged in selling a general line of food and related products to food stores.

A. Cooperative:
(Independent) – Retailers who are stockholder members of cooperative wholesale buying groups.

B. Voluntary:
(Independent) – Retailers who belong to voluntary merchandising groups sponsored by wholesalers and who operate under a common name.

C. Unaffiliated:
(Independent) – Retailers who are not affiliated with either wholesale, cooperative or voluntary merchandising groups sponsored by wholesalers.

**Region** The geographic area in which the company headquarters is located. Listed below are the states which fall into each region.

**New England**
Connecticut
Maine
Massachusetts
New Hampshire
Rhode Island
Vermont

**Middle Atlantic**
New Jersey
New York
Pennsylvania

**East North Central**
Illinois
Indiana
Michigan
Ohio
Wisconsin

**West North Central**
Iowa
Kansas
Minnesota
Missouri
Nebraska
North Dakota
South Dakota

**Southeast**
Alabama
Delaware
District of Columbia
Florida
Georgia
Kentucky
Maryland
Mississippi
North Carolina
Puerto Rico
South Carolina
Tennessee
Virginia
West Virginia

**West South Central**
Arkansas
Louisiana
Oklahoma
Texas

**Mountain**
Arizona
Colorado
Idaho
Montana
Nevada
New Mexico
Utah
Wyoming

**Pacific**
Alaska
California
Hawaii
Oregon
Washington

Canada

# QUESTIONNAIRES

## FOLLOWING ARE SAMPLES OF THE SURVEY FORMS USED TO COLLECT DATA FOR THE 1989 REPORT

# THE FMI RETAIL OPERATIONS
# QUESTIONNAIRE 1989

This questionnaire is part of FMI's annual industry study. It is designed to track trends and developments in the supermarket retail operations. We encourage your participation so that the results may be as representative of the industry as possible. All data will be held in strictest confidence. Please answer as many questions as possible. If you have any questions, please call the Research Department of FMI - (202)429-8276.

---

## A. GENERAL OPERATIONS

1. How many supermarkets will your company operate as of December 31, 1988
(a supermarket is a retail food store with at least $2 million in annual sales) . . . . . ___,___ ___ ___ supermarkets

2. What were your retail supermarket sales in (if 1988 figures are not yet available, please give an estimate):

a. 1987 . . . . . . . . . . . . . $___ ___,___ ___ ___.___ million

b. 1988 . . . . . . . . . . . . . $___ ___,___ ___ ___.___ million

3. What were your sales for "identical stores" (those supermarkets which you had in operation throughout the entire two-year period, 1987 and 1988) for:

a. 1987 . . . . . . . . . . . . . $___ ___,___ ___ ___.___million

b. 1988 . . . . . . . . . . . . . $___ ___,___ ___ ___.___million

4. What percentage of your operation is supplied by the following:

a. own warehouse . . . . . . . . . . . . . ___ ___ ___.___ %
b. voluntary wholesaler . . . . . . . . . ___ ___ ___.___ %
c. cooperative wholesaler . . . . . . . . ___ ___ ___.___ %
d. unaffiliated wholesaler . . . . . . . . ___ ___ ___.___ %
e. direct vendor deliveries . . . . . . . ___ ___ ___.___ %
TOTAL 1 0 0 . 0 %

5. What percentage of your total supermarket sales in 1988 is accounted for by:
(If you do not separate GM and HaBA please answer part "c" and "d")

a. General Merchandise . . . . . . . . . ___ ___ ___.___ %
b. Health and Beauty Aids . . . . . . . . ___ ___ ___.___ %
c. GM/HaBA combined . . . . . . . . . . . ___ ___ ___.___ %
d. Tobacco . . . . . . . . . . . . . . . . ___ ___ ___.___ %

6. Please provide total company data for the following items:

a. Average weekly sales per supermarket in 1988 . . . . . . . . . . . . . . $ ___,___ ___ ___,___ ___ ___

b. Average weekly sales per checkout in 1988 . . . . . . . . . . . . . . . . $ ___ ___,___ ___ ___

c. Average sale per customer transaction for your supermarkets in 1988 . . . . . . $ ___ ___.___ ___

d. Average sales per labor hour for store employees in 1988 . . . . . . . . . . . . $ ___ ___ ___.___ ___

e. Average weekly sales per square foot of selling area in 1988 (divide average weekly sales for all your supermarkets in operation the entire year by the number of square feet of selling area - customer area in those stores) . . . . $ ___ ___.___ ___

6. (continued)

f. **Total size**, in square feet, of your typical store . . . . . . . . . . . . . . . . . . ___ ___ ___,___ ___ ___

g. Average retail **price per item** for all items sold in your supermarket during 1988?. $___.___ ___

h. On average, **how many** different **items** does your typical supermarket carry (count each brand, size, flavor, variety, type of meat cut, etc., as a separate item)? . . . . . ___ ___,___ ___ ___

i. In **how many stores** are you now scanning? . . . . . . . . . . . . . . . . . . . . . ___,___ ___ ___

7. Please complete the following chart for each type of store you operate. If you do not operate a particular store type, enter NA. Even though your company's definitions of store type may differ from the definitions that follow, we ask that you use the formats as defined here. This will help keep the store type data consistent for industrywide information.

| | Conventional Supermarkets (30,000 and under total sq. ft.) | Super Stores (over 30,000 total sq. ft., expanded food and non-food selection) | Combination Stores (over 30,000 total sq.ft., and at least 25% of area in general merchandise) | Warehouse Stores (uses utilitarian fixtures and emphasizes lowered prices at expense of cust. serv.) |
|---|---|---|---|---|
| Number of Each Type of Store | ___ ___ ___ | ___ ___ ___ | ___ ___ ___ | ___ ___ ___ |
| Average Weekly Sales per Store | $___,___ ___ ___,___ ___ ___ | $___,___ ___ ___,___ ___ ___ | $___,___ ___ ___,___ ___ ___ | $___,___ ___ ___,___ ___ ___ |
| Average Weekly Sales per Checkout | $___ ___,___ ___ ___ | $___ ___,___ ___ ___ | $___ ___,___ ___ ___ | $___ ___,___ ___ ___ |
| Average Sale per Customer Transaction | $ ___ ___.___ ___ | $ ___ ___.___ ___ | $ ___ ___.___ ___ | $ ___ ___.___ ___ |
| Sales per Labor Hour | $___ ___ ___.___ ___ | $___ ___ ___.___ ___ | $___ ___ ___.___ ___ | $___ ___ ___.___ ___ |
| Average Weekly Sales per Sq. Ft. of Selling Area | $___ ___.___ ___ | $___ ___.___ ___ | $___ ___.___ ___ | $___ ___.___ ___ |
| Average Total Size in Sq. Ft. | ___ ___ ___,___ ___ ___ | ___ ___ ___,___ ___ ___ | ___ ___ ___,___ ___ ___ | ___ ___ ___,___ ___ ___ |
| Average Retail Price per Item | $ ___.___ ___ | $ ___.___ ___ | $ ___.___ ___ | $ ___.___ ___ |
| Average Number of Items Carried | ___ ___,___ ___ ___ | ___ ___,___ ___ ___ | ___ ___,___ ___ ___ | ___ ___,___ ___ ___ |

## B. CUSTOMER SERVICES

8. Please indicate the number of your stores which offer the following services:

a. Deli offering carry-out items __,__ __ __
b. Lunch counter/snack bar . . . __,__ __ __
c. Service meat . . . . . . . __,__ __ __
d. Fresh seafood . . . . . . . __,__ __ __
e. Scratch and/or bake-off bakery __,__ __ __
f. Catering . . . . . . . . . . . __,__ __ __
g. Home delivery service . . . . __,__ __ __
i. Restaurant . . . . . . . __,__ __ __
j. Floral/plant shop . . . . __,__ __ __
k. Salad Bar . . . . . . . . . __,__ __ __
l. Photographic service center __,__ __ __
m. Cosmetic center . . . . . __,__ __ __
n. Pharmacy . . . . . . . . . __,__ __ __
o. Nutritional shelf tags. . __,__ __ __
p. Reading Center __,__ __ __
q. Courtesy booth __,__ __ __
r. Wine . . . . . __,__ __ __
s. Liquor . . . . __,__ __ __
t. Beer . . . . . __,__ __ __
u. Video Rental . __,__ __ __
v. In-store banks __,__ __ __
h. Cash Dispensing Machines (Automatic Teller Machines or ATMs) __,__ __ __

9. HOW MANY of your supermarkets accept credit cards for:

Grocery items . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . __,__ __ __ supermarkets

Pharmaceutical items and/or non-foods . . . . . . . . . . . . . . . . . . . . . . . __,__ __ __ supermarkets

10. In HOW MANY of your stores, if any, are you accepting direct debit cards at the checkout . . __,__ __ __ supermarkets

## C. ADVERTISING

11. What percentage of your total sales was spent on supermarket advertising (net of co-op revenue) . . . . __ __.__%

12. What percentage of your advertising budget was spent on:

In-store coupons __ __.__%
Newspaper ads __ __.__%
Billboards __ __.__%
Radio ads __ __.__%
Television ads __ __.__%
Mail/flyer __ __.__%
1 0 0. 0%

**D. PLASTIC/PAPER BAGS**

(These questions concern only the bags used to carry the customer's groceries. Do not include deli packs, bakery items, etc.)

13. HOW MANY of your stores:

a. offer a choice of paper or plastic (If none, please put "0") . . . . . ___,___ ___ ___ supermarkets

b. offer plastic bags exclusively (If none, please put a "0") . . . . . . ___,___ ___ ___ supermarkets

c. offer paper bags exclusively (If none, please put a "0"). . . . . . . . ___,___ ___ ___ supermarkets

**E. WASTE MANAGEMENT**

14. HOW MANY of your stores are recycling waste? . . . . . . . . . . . . . . . . . ___ ___ supermarkets
(If none, please put "0" and skip to question 16)

15. What items are being recycled (Please check)

a. Cardboard /___/

b. Meat Trimmings /___/

c. Other (Please specify) ____________________________________________

____________________________________________

16. What were your waste disposal fees per ton of waste in December 1987? $___ ___ ___.___ per ton

What were your waste disposal fees per ton of waste in December 1988? $___ ___ ___.___ per ton

**F. RECLAMATION CENTERS**

17. Does your company use a centralized product reclaim center? YES /___/ NO /___/

18. If YES does your company: operate the center YES /___/ NO /___/

use a third party's center YES /___/ NO /___/

---

## FOOD MARKETING INDUSTRY SPEAKS, 1989
## STUDY OF RECRUITMENT AND RETENTION PRACTICES IN THE RETAIL SUPERMARKET INDUSTRY

This survey is part of FMI's annual study of the industry, the Food Marketing Industry Speaks. Each year this project examines retail and distribution center operations as well as several special topics of importance to the industry. This year's study will look at the crucial area of recruitment and retention. Your response is urgently needed so the results may be as representative of the industry as possible. If you have any questions, please feel free to contact the Research Department at FMI at 202-429-8276.

---

### A. GENERAL QUESTIONS

1. How many supermarkets does your company operate (a supermarket is a retail food store with annual sales of at least $2 million)? . . . . . . . . . . . . . __,__ __ __ Supermarkets

2. What were your company's approximate annual supermarket sales in 1988 (please check the proper category)?

Annual Sales (Millions): Under $10 /__/ $11-$30 /__/ $31-$100 /__/ $101-$250 /__/

$251-$500/__/ $500-$1 billion /__/ $1-$3 billion /__/ Over $3 billion /__/

3. Are your company's store level personnel:

Both union and non-union . . . . . . . . . . . . . . /__/

Union only . . . . . . . . . . . . . . . . . . . . . /__/

Non-union only . . . . . . . . . . . . . . . . . . . /__/

---

### B. RECRUITMENT

4. In general, is your company having difficulty recruiting:

Store Managers . . . . . . . . . . . . . . . . . . . . . . . . . YES/__/ NO /__/

Full-time store personnel below the level of manager . . . . . . . . YES/__/ NO /__/

Part-time store personnel below the level of manager . . . . . . . . YES/__/ NO /__/

5. In a typical store, what percentage of available positions are not being filled for lack of personnel? . . . . . . . . . . . . . . . . . . . . . . . . __ __ %

6. Have you tried to make the employment application process easier for potential employees through any of the following (please check all that are applicable)?:

Mobile employment offices (vans, etc.) . . . . . . . . . . . . . . . . /__/

Multiple employment centers. . . . . . . . . . . . . . . . . . . . . . /__/

Hiring in individual stores. . . . . . . . . . . . . . . . . . . . . . /__/

FOOD MARKETING INSTITUTE

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7. Are you using any of the following methods to recruit people (Please check all that are applicable)?

Directly advertising in TV ads ☐

Directly advertising in radio ads ☐

Directly advertising in newspaper ads ☐

Using marketing ads (image ads) ☐

Visiting college career centers ☐

Participating in college job fairs ☐

Participating in high school job fairs ☐

Running internal job fairs ☐

Posting jobs within the company. ☐

Listed with state employment agencies ☐

Going out into high school and junior high school career awareness programs ☐

Involved in DECA or other vocational awareness programs? ☐

8. Have you made new outreach attempts toward any of the following groups (please check: if none, please skip to question 10)?

Physically handicapped ☐

Developmentally disabled ☐

Senior citizens. ☐

Members of minority groups ☐

9. If so, are your supervisors given any special training to support these people once hired. YES ☐ NO ☐

---

C. RETENTION

10. Does your company have a formal AIDs policy? YES ☐ NO ☐

11a. Do you have an Employee Assistance program in place? YES ☐ NO ☐
(If NO, please skip to question 12)

11b. Is it done (please check):
Within the company ☐
Outside the company. ☐

11c. Is the program (please check):
For alcohol and drugs only . . . . . . . . . . . . . . . . . . . . . . . . /__/
A "broadbrush program" . . . . . . . . . . . . . . . . . . . . . . . . . /__/

11d. Is the program available to (please check):
Management only . . . . . . . . . . . . . . . . . . . . . . . . . . . /__/
All full-timers only . . . . . . . . . . . . . . . . . . . . . . . . . /__/
All employees, both full and part-time . . . . . . . . . . . . . . . . . /__/

12. If you don't have such a program, are you intending to implement one:
In the next 12 months. . . . . . . . . . . . . . . . . . . . . . . . . /__/
In the next 24 months. . . . . . . . . . . . . . . . . . . . . . . . . /__/
Not at all . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . /__/

13a. Do you offer health insurance plans for:
Full-timers only . . . . . . . . . . . . . . . . . . . . . . . . . . . /__/
Both full and part-timers. . . . . . . . . . . . . . . . . . . . . . . /__/

13b. If so, what is the deductable for:
Full-timers?. . . . . . . . . . . . . . . . . . . . . . . $________Deductable

Part-timers?. . . . . . . . . . . . . . . . . . . . . . . $________Deductable

14a. Please check if your company offers any of the following benefits. Also indicate whether they are offered to full-timers only or to both full and part-timers.

a. Paid vacation . . . . . . . . . . YES/__/ Full-Time only/__/ Full/Part-Time/__/
b. Personal holidays . . . . . . . . YES/__/ Full-Time only/__/ Full/Part-Time/__/
c. Paid holidays . . . . . . . . . . YES/__/ Full-Time only/__/ Full/Part-Time/__/
d. Child-care. . . . . . . . . . . . YES/__/ Full-Time only/__/ Full/Part-Time/__/
e. Transportation reimbursment . . . YES/__/ Full-Time only/__/ Full/Part-Time/__/
f. Retirement plans. . . . . . . . . YES/__/ Full-Time only/__/ Full/Part-Time/__/
g. Job sharing . . . . . . . . . . . YES/__/ Full-Time only/__/ Full/Part-Time/__/
h. Paid sick leave . . . . . . . . . YES/__/ Full-Time only/__/ Full/Part-Time/__/
i. Life insurance. . . . . . . . . . YES/__/ Full-Time only/__/ Full/Part-Time/__/
j. Health-club memberships . . . . . YES/__/ Full-Time only/__/ Full/Part-Time/__/
k. Tuition reimbursment. . . . . . . YES/__/ Full-Time only/__/ Full/Part-Time/__/

14b. Looking at the same list of benefits, please check those which your company is seriously considering offering at some time in the future.

a. Paid vacation . . . . . . . . . . YES/__/ Full-Time only/__/ Full/Part-Time/__/
b. Personal holidays . . . . . . . . YES/__/ Full-Time only/__/ Full/Part-Time/__/
c. Paid holidays . . . . . . . . . . YES/__/ Full-Time only/__/ Full/Part-Time/__/
d. Child-care. . . . . . . . . . . . YES/__/ Full-Time only/__/ Full/Part-Time/__/
e. Transportation reimbursment . . . YES/__/ Full-Time only/__/ Full/Part-Time/__/
f. Retirement plans. . . . . . . . . YES/__/ Full-Time only/__/ Full/Part-Time/__/
g. Job sharing . . . . . . . . . . . YES/__/ Full-Time only/__/ Full/Part-Time/__/
h. Paid sick leave . . . . . . . . . YES/__/ Full-Time only/__/ Full/Part-Time/__/
i. Life insurance. . . . . . . . . . YES/__/ Full-Time only/__/ Full/Part-Time/__/
j. Health-club memberships . . . . . YES/__/ Full-Time only/__/ Full/Part-Time/__/
k. Tuition reimbursment. . . . . . . YES/__/ Full-Time only/__/ Full/Part-Time/__/

15. Does your company have any social associations or special social functions for employees and their families? . . . . . . . . . . . . . . YES/__/ NO/__/

16a. Are outstanding employees provided with special recognition? . . . . . . . . . . . YES/__/ NO/__/
(If NO please skip to question 17)

16b. Where appropriate, are there monetary awards associated with this recognition? . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . YES/__/ NO/__/

17. How frequently are the performances of employees below the level of department manager reviewed for evaluation and or pay raises (please check)?

/__/ one per year /__/ two per year three per year /__/

/__/ other number per year (Please specify) ___ ___ per year

17b. Would you consider it valuable to increase the frequency of these reviews?. . . YES/__/ NO/__/

18. Do you recognize outstanding public service by employees? . . . . . . . . . . . . . YES/__/ NO/__/

19. Do you offer profit sharing for non-management employees? . . . . . . . . . . . . . YES/__/ NO/__/

20a. Do you have "pay-for-knowledge programs" in which employees are paid extra for additional skills learned beyond those in the job for which they were initially hired? . . . . . . . . . . . . . . . . . . YES/__/ NO/__/

20b. Are you planning to implement any such programs in the future . . . . . . . . . . YES/__/ NO/__/

21. In general, would you say that your employees are actively involved in problem solving at the store level? . . . . . . . . . . . . . . . . . . . . . . YES/__/ NO/__/

22. Have you experimented with conducting self-directed work groups? . . . . . . . . YES/__/ NO/__/

23. Has your company conducted an employee attitude survey in the past three years? YES/__/ NO/__/

24. Do you do exit interviews with any departing employees? . . . . . . . . . . . . . YES/__/ NO/__/

25. Are the results of exit interviews and/or employee attitude surveys used as part of strategic planning? . . . . . . . . . . . . . . . . . . . . . YES/__/ NO/__/

FOOD MARKETING INSTITUTE

# THE FOOD MARKETING INDUSTRY SPEAKS, 1989

## STORE MANAGER PROFILE QUESTIONNAIRE

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## FOOD MARKETING INDUSTRY SPEAKS, 1989
## STORE MANAGER PROFILE STUDY

This questionnaire is part of FMI's annual industry study. Each year the Speaks study examines retail supermarket operations and distribution center operations as well as several special topics. This year's study will examine the store manager and other personnel issues. We encourage your participation in this store manager profile portion so that the results may be as representative of the industry as possible. All individual data will be held in strictest confidence. Please answer as many questions as possible. If you have any questions, please call the Research Department of FMI at 202-429-8276.

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### A. COMPANY QUESTIONS

1. How many supermarkets does your company operate (a supermarket is a retail food store with annual sales of at least $2 million)? . . . . . . . . . . . . . . . . . . . . ___,___ ___ ___ ___Supermarkets

2. What were your company's approximate annual supermarket sales in 1988 (please check the proper category)?

Annual Sales (Millions): Under $10 /__/ $11-$30 /__/ $31-$100 /__/ $101-$250 /__/

$251-$500/__/ $501-$1 billion /__/ $1-$3 billion /__/ Over $3 billion /__/

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### B. MANAGER DEMOGRAPHICS

1. What percentage of your store managers are:

__ __% Male
__ __% Female
1 0 0%

2a. Considering the highest educational level reached, what percentage of your store managers fit into the following categories:

__ __% High school diploma
__ __% Associates degree
__ __% Bachelors degree
__ __% Graduate degree
__ __% No high school diploma
1 0 0%

2b. Looking ahead five years to the year 1993 and considering the highest educational level reached, what percentage of your store managers do you expect will fit into the following categories:

__ __% High school diploma
__ __% Associates degree
__ __% Bachelors degree
__ __% Graduate degree
__ __% No high school diploma
1 0 0%

3. What percentage of your store managers are in the following age groups:

__ __% 20 to 30
__ __% 31 to 40
__ __% 41 to 50
__ __% 51+
1 0 0%

4. What percentage of your store managers have been in their present position for:

__ __% 1 - 5 years
__ __% 6 - 10 years
__ __% 11 - 15 years
__ __% 16 - 20 years
__ __% 21 years +
1 0 0%

5. What percent of your store managers have left the company in the last twelve months: (as a percentage of average number of store managers in that period) ___ ___%

6. Of those managers who have left the company, what percentage have left the industry? ___ ___%

7. What percentage of your store managers have stepped down from a management position in the past 12 months? ___ ___%

8. What percentage of your store managers have moved into the following positions in the past 12 months:

District Manager ___ ___%

Merchandiser ___ ___%

Other headquarters promotion ___ ___%

Lateral move to headquarters ___ ___%

9. What percentage of your store managers came from the following places:
___ ___% Traditional "up-the ranks" route
___ ___% College into a management training program
___ ___% Management jobs in industries outside food retailing
___ ___% Other retailing chains
1 0 0 %

10. In the the year 1993, what percentage of your managers do you expect will come from the following places?
___ ___% Traditional "up-the ranks" route
___ ___% College into a management training program
___ ___% Management jobs in industries outside food retailing
___ ___% Other retailing chains
1 0 0 %

## III. MANAGER SELECTION, TRAINING, AND DEVELOPMENT

11. Which of the following methods does your company use to select store managers (please check all that apply)?

Application blanks. . . . ☐ Interviews . . . . . . . . . ☐
Psychological Tests . . . ☐ Medical Examinations . . . ☐
Performance Tests . . . ☐ Drug Testing . . . . . . . . ☐

Other (Please specify) ____________________________________.

____________________________________

____________________________________

12. What is the average number of years it takes to become a store manager from the time of entering the initial manager-training program.

___ ___.___ Years

13. Does your company have a formal continuing education program for your current store managers? (If NO please skip to question 16)

YES ☐ NO ☐

14. If so, which of the following topics are addressed? (check all appropriate boxes)

☐ Planning and Organizing
☐ Communication
☐ Motivation
☐ Performance evaluation
☐ Delegation
☐ Counseling & Discipline

15. Please list any other topics covered in your continuing education program.

1. ________________________________________

2. ________________________________________

3. ________________________________________

## IV. CENTRAL POLICY DEVELOPMENT

The following questions will determine how much influence your store managers excercise in the development of marketing/merchandising and other policies for the entire company.

16. Please rate on the following scale how much influence you believe store managers have in marketing decisions:

1 = NONE 2 = SOME 3 = QUITE A LOT 4 = MOST 5 = ALMOST ALL
(Please circle)
1 2 3 4 5

17. Please rate on the above scale the amount of influence you believe your store managers have in the following areas (please circle):

| | | | | | |
|---|---|---|---|---|---|
| Hiring of part-time employees | 1 | 2 | 3 | 4 | 5 |
| Firing of part-time employees | 1 | 2 | 3 | 4 | 5 |
| Hiring of all but department managers | 1 | 2 | 3 | 4 | 5 |
| Firing of all but department managers | 1 | 2 | 3 | 4 | 5 |
| Store policies | 1 | 2 | 3 | 4 | 5 |
| Pricing | 1 | 2 | 3 | 4 | 5 |
| Pricing markdowns | 1 | 2 | 3 | 4 | 5 |
| Selection of department heads | 1 | 2 | 3 | 4 | 5 |
| Merchandise selection | 1 | 2 | 3 | 4 | 5 |
| Selecting sale items | 1 | 2 | 3 | 4 | 5 |

# FOOD MARKETING INDUSTRY SPEAKS 1989
## LOSS PREVENTION ISSUES SURVEY

This questionnaire is part of FMI's annual industry study. Each year the Speaks study examines retail supermarket operations and distribution center operations as well as several special topics. One of the topics in the 1989 study will be loss prevention. We encourage your participation in this project so that the results may be as representative of the industry as possible. ALL INDIVIDUAL DATA WILL BE HELD IN STRICTEST CONFIDENCE. Please answer as many questions as possible. If you have any questions, please call the Research Department of FMI at 202-429-8276.

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### A. DEMOGRAPHIC QUESTIONS

1. How many supermarkets does your company operate (a supermarket is a retail food store with annual sales of at least $2 million)? . . . . . . . . . . . ___,___ ___ ___ ___Supermarkets

2. What were your company's approximate annual supermarket sales in 1988 (please check the proper category)?

Annual Sales (Millions): Under $10 /__/ $10-$30 /__/ $31-$100 /__/ $101-$250 /__/

$251-$500/__/ $500-$1 billion /__/ $1-$3 billion /__/ Over $3 billion /__/

---

### B. STORE LOSSES

3. What is the approximate percentage of your total store losses due to the following causes?

___ ___% Total theft
___ ___% Damage/customer neglect
___ ___% Equipment losses (include shopping carts)
___ ___% Paper, wrap, supplies
___ ___% Other
1 0 0 %

4. What is the approximate percentage of your theft losses due to the following causes?

___ ___% Employee/internal theft
___ ___% Shoplifting
___ ___% Vendor theft
___ ___% Robberies*
___ ___% Burglaries+
1 0 0 %

*Robbery -- is the taking or attempting to take anything of value from the care, custody, or control of a person or persons by force or threat of force or violence and/or by putting the victim in fear.

+Burglary -- unlawful entry of any fixed structure, vehicle or vessel used for regular residence, industry or business, with or without force, with the intent to commit a felony or larceny.

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### C. SHOPLIFTING

5. How many shoplifters did your company apprehend in 1988? . . . . . . . . ___ ___ ___ ___

6. What was the average value of the merchandise recovered? . . . . . . $___ ___.___

7. Of the shoplifters apprehended, how many were:

Arrested?___ ___ ___ ___ Prosecuted?___ ___ ___ ___

**ALL INDIVIDUAL DATA IN THIS SURVEY ARE HELD IN STRICTEST CONFIDENCE. THE FOOD MARKETING INSTITUTE WILL NOT REVEAL THE CONTENTS OF ANY INDIVIDUAL SURVEY TO ANYONE.**

8. Please rank in order from one to three the type of merchandise most often taken (one the most often taken, two the second most often taken, etc.)

___ Cigarettes
___ Meat
___ Deli
___ Vitamins
___ HaBA items
___ Other foods
___ Other(Please specify)______________________________

___ Batteries
___ Clothing
___ Seafood
___ School supplies
___ Pet Supplies
___ Other non-foods

9. If applicable, do you use the civil recovery standards to recoup some of the costs of apprehending shoplifters?

/__/ Yes /__/ No

10. What is the approximate conviction rate of those prosecuted? . . . . . . . . . ___ ___%

11. How many of your stores have installed (if none, please put a "zero"):

Electronic article surveilance? . . . . . ___ ___ ___ stores

Video surveilance? . . . . . . . . . . . . ___ ___ ___ stores

12. Does your company have a formal policy and procedure in place for dealing with a shoplifter once apprehension has occurred:

/__/ Yes /__/ No

---

D. ROBBERIES AND BURGALRIES

13. How many robberies did your company experience in 1988 (a robbery is the taking or attempting to take anything of value from the care, custody, or control of a person or persons by force or threat of force or violence and/or by putting the victim in fear)?

___ ___ ___ Robberies

14. What was the average dollar amount of cash/merchandise taken in each instance of robbery? . . . . . . . . . . . . . . . . . . . . . . . . $___,___ ___ ___

15a. What time of day did most of your robberies occur (Please check the most frequent time)?

Midnight-6AM /__/ 6AM-Noon /__/ Noon-6PM /__/ 6PM-Midnight /__/

15b. On what day of the week did the most robberies occur (Please check)

Monday /__/ Tuesday /__/ Wednesday /__/ Thursday /__/ Friday /__/ Saturday /__/ Sunday /__/

16. How many burglaries did your company experience in 1988 (Burglary -- unlawful entry of any fixed structure, vehicle or vessel used for regular residence, industry or business, with or without force, with the intent to commit a felony or larceny)?

___ ___ ___ burglaries

17. What was the average dollar amount of cash/merchandise taken in each instance of burglary? . . . . . . . . . . . . . . . . . . . . . . . $___,___ ___ ___

## E. EMPLOYEE THEFT

18. How many incidents of employee theft were discovered in your company in 1988?. ___ ___ ___

19. What was the average known value of the cash/merchandise recovered in each instance? . . . . . . . . . . . . . . . . . . . . . . . . . . . . . .$ ___ ___ ___

20. Of those employees caught how many:
___ ___ ___ Resigned
___ ___ ___ Were dismissed
___ ___ ___ Prosecuted
___ ___ ___ Were dismissed and prosecuted
___ ___ ___ Resigned and were prosecuted

---

## F. SHOPPING CART LOSSES AND LOSS PREVENTION

21. How many of your company's shopping carts were lost in 1988? . . . . ___ ___ ___ ___ carts

22. What was the total value of the lost carts? . . . . . . . . . . . . . . . . $_______________

23. How many of your stores do not allow shopping carts to be taken into the parking lot? . . . . . . . . . . . . . . . . . . . . . . . . . . . ___,___ ___ ___ stores

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## G. LOSS PREVENTION TRAINING AND PERSONNEL

24. Does your company employ (check all that are applicable):
☐ Store detectives
☐ Uniformed company security guards
☐ Uniformed contract security guards
☐ Uniformed police
☐ Mystery shoppers

25. Does your company have a full-time person devoted exclusively to security and loss prevention?
☐ Yes ☐ No

26. Does your company have a full-time person devoted exclusively to insurance/risk management?
☐ Yes ☐ No

27. Do you have formal loss prevention manuals for your employees?
☐ Yes ☐ No

28. Does your company provide formal loss-prevention training for (check all applicable):
☐ Store managers
☐ Warehouse and distribution center managers
☐ Store personnel below the level of manager
☐ Security guards

29. If you do provide formal training, approximately what percentage of the training is:
___ ___% In-house classroom
___ ___% Out-of-house classroom
___ ___% On-the-job
___ ___% Manuals
___ ___% Seminars, workshops
___ ___% Meetings
___ ___% Other (please specify)_______________________________
1 0 0 %

30. Does your company have a drug testing policy for your (check all applicable):
☐ Management employees
☐ Truck drivers
☐ Store personnel below the level of manager
☐ Warehouse personnel below the level of manager

**If you did not check any, please skip to question 32**

**31. If you have such a policy, is the testing done:**

☐ Pre-employment
☐ "for cause" i.e. following a serious accident involving injuries or high monetary losses
☐ Both

32a. Are you using written honesty test for applicants? (If NO, please skip to question 34)

☐ Yes ☐ No

32b. If YES, are these tests issued to applicants for (check all applicable):

☐ Management positions ☐ Store positions below the level of manager
☐ Truck drivers ☐ Warehouse positions below the level of supervisor

33. What percentage of your applicants are you rejecting through such tests? . . . . ___%

---

## H. LOSS PREVENTION EXPENSES

34. What is the approximate amount your company spends on all security/loss prevention costs? . . . . . . . . . . . . . . . . . . . . . . $____________

35. What is the approximate percentage of your annual sales budgeted for security/loss prevention? . . . . . . . . . . . . . . . . . . ___ ___.___%

36. Does your company have a specific line item in its budget for security/loss prevention? (IF NO YOU NEED NOT COMPLETE THE REMAINDER OF THE SURVEY)

☐ Yes ☐ No

37. Does your security/loss prevention budget include:

a. Security/loss prevention personnel wages, fringes, and expenses only?
Yes ☐ No ☐ Not Applicable ☐

b. The above plus costs of closed circuit television and other security equipment purchases and maintenance costs.
Yes ☐ No ☐ Not Applicable ☐

38. Are the costs of contract security guards included in your budget or are they charged to the individual facility?
Budget ☐ Individual facility ☐ Not Applicable ☐

39. Are the costs of off-duty police wages indluded in your budget or are they charged to the individual facility?
Budget ☐ Individual facility ☐ Not Applicable ☐

FOOD MARKETING INSTITUTE

# THE FOOD MARKETING INDUSTRY SPEAKS, 1989

# DISTRIBUTION CENTER OPERATIONS QUESTIONNAIRE

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# FMI DISTRIBUTION CENTER OPERATIONS QUESTIONNAIRE 1989

This questionnaire is part of FMI's annual study of the food distribution industry, the Food Marketing Industry Speaks. This year's questionnaire has been substantially revised from previous years with an emphasis on personnel issues in the distribution center. Only with your participation and expertise can concise and representative data be developed. All information will be held in strictest confidence.

If you have any questions, please call the research department of FMI (202)429-8276.

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## A. GENERAL QUESTIONS

1. What is your company's primary type (please check only one)?
   - a. retailer . . . . . . . . . . . ☐
   - b. cooperative wholesaler . . . ☐
   - c. voluntary wholesaler . . . . ☐
   - d. affiliated wholesaler. . . . ☐
   - e. combined retailer/wholesaler ☐

2. What were your company sales in (if 1988 figures are not available, please give an estimate)?
   a. 1987 $___,___ ___ ___.___million

   b. 1988 $___,___ ___ ___.___million

3. How many supermarkets does your operation serve/own (a supermarket is a retail food store with annual sales of at least two million dollars)?
   a. own ___,___ ___ ___stores

   b. serve as a wholesaler ___,___ ___ ___stores

4. What percentage of your total annual shipping volume in dollars is attributed to:
   - a. company owned stores ___ ___ ___.___%
   - b. independent food stores ___ ___ ___.___%
   - c. other food chains (11+stores) ___ ___ ___.___%
   - d. convenience stores ___ ___ ___.___%
   - e. food service/institutional service ___ ___ ___.___%
   - f. other ___ ___ ___.___%
   - Total 1 0 0 . 0 %

## B. WHOLESALE OPERATIONS

If you have wholesale operations, please answer question 5.

5. Does your company provide any of the following services to your retailers (please circle YES or NO)?

| | YES | NO | | YES | NO |
|---|---|---|---|---|---|
| a. advertising program | 1 | 2 | j. lease financing | 1 | 2 |
| b. educational/training program | 1 | 2 | k. equipment procurement | 1 | 2 |
| c. retail account service | 1 | 2 | l. gross margin report by item | 1 | 2 |
| d. member payroll | 1 | 2 | m. handle private label | 1 | 2 |
| e. individual retail pricing program | 1 | 2 | n. handle generic label | 1 | 2 |
| f. real estate & store engineering | 1 | 2 | o. discount programs | 1 | 2 |
| g. interior decor & design service | 1 | 2 | p. space allocation | 1 | 2 |
| h. product movement data | 1 | 2 | q. scanning support | 1 | 2 |
| i. equipment & fixture financing | 1 | 2 | r. DSD system | 1 | 2 |
| | | | s. centralized product reclaim center . . . . . . . . . . . . . . | 1 | 2 |
| | | | t. other (please specify below) . . . . . . . . . . . . . . . . . | 1 | 2 |

________________________________________

________________________________________

## C. DRY GROCERY DISTRIBUTION CENTER OPERATIONS

Please answer with the combined average of all Dry Grocery Distribution Centers if you operate more than one. (See notes below for explanation)

6. Distribution Center dollar volume at cost (1) $__________

7. Average number of supermarkets served per center ___,___ ___ ___

8. Total Distribution Center square footage (2) ___,___ ___ ___,___ ___ ___

9. Total number of employees in each of the following categories:
   - -Direct employees (include all hourly employees) ___,___ ___ ___
   - -Supervisors/management (Include all salaried employees) ___,___ ___ ___

9b. Total number of employees in the center (3) ___,___ ___ ___

10. Are the majority of employees unionized? (Please circle YES or NO) YES NO

11. Number of cases selected per direct labor hour (4) __________

### EXPLANATORY NOTES

(1) Distribution Center dollar volume at cost - includes all dry grocery. Exclude fresh meet, general merchandise, HaBA, produce, etc. Cost should include the following:
- Original cost of merchandise less discounts and allowances.
- Freight-in

(2) Distribution Center square footage - total area includes everything under the roof such as receiving, storage and offices which are involved with the dry grocery center. Exclude manufacturing or packing plants.

(3) Number of employees - please include all full-time and part-time employees who work in the center.

(4) Direct labor hour - only include the labor used to physically move the merchandise through the warehouse.

### SALARIES, WAGES AND BENEFITS

(These answers will be reported as a percentage of distribution center volume at cost. See note below for explanation)

12. Total supervisor, administration and clerical salaries $__________

13. Total hourly wages $__________

14. Payroll taxes and fringe benefits (5) $__________

15. Total payroll costs (total items 12-14) $__________

### EXPLANATORY NOTE

(5) Payroll taxes and fringe benefits, include total amount for all supervisor, administration, clerical and hourly wage benefits.

## D. POLICIES AND PROGRAMS

16. Do any of your centers have engineered labor standards (please circle)? YES NO

17. Are the standards used to (Check all applicable)?

-Plan shifts ☐ -Track area productivity ☐
-Track individual productivity ☐ -Track shift productivity ☐

18. How many years have the standards been in effect? ___ ___years

19. Do any of your centers have quality circles? YES NO

20. How many years have quality circles been in use? ___ ___years

21. Does your company have an Employee Assistance Program (EAP) for its distribution center employees(If no, skip to q. 25)? YES NO

22. Is it done: -Within the company? YES NO

-Outside the company? YES NO

23. Is the program: -For alcohol and drugs only? YES NO

-A "broadbrush program?" YES NO

24. Is the program available to: Full-time employees only? YES NO

-All employees (full and part-time)? YES NO

25. If you don't have such a program, are you intending to implement one:
-In the next 12 months? YES NO

-In the next 24 months? YES NO

-Not at all? YES NO

26. Does your company have a drug testing policy for your:
-Distribution center management? YES NO
-Warehouse personnel below the level of manager? YES NO

-Truck drivers? YES NO

27. If you have such a policy, is the testing done:
-Pre-employment? YES NO
-"for cause" ie. following a serious accident involving injuries or high monetary losses? YES NO

-Both? YES NO

28. Do you have a program to train your distribution center employees in proper lifting techniques? YES NO

29. Do you have a warehouse based recycling program? YES NO